



## **Sales Report for:**

**Sam Sample**

ACME Inc.

12/30/2003

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## Introduction

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Individuals have a recognizable and understandable behavioral style. Style can be described as the way in which people think, solve problems, express feelings and interact with others to get a job done.

Proception2 identifies and describes those external behaviors, which each style displays to others in a work environment. This report discusses behavior in a sales environment. It uses a model of behavior developed by William M. Marston known as DISC. Marston's model has been tested, proven accurate and effective with millions of people for more than 40 years.

The terms most often associated with Marston's Behavioral Model are: Dominance, Influence, Steadiness and Compliance. These factors can range in intensity and work independently or in tandem with the other behavioral factors. The interrelationship of these factors describes how an individual responds to the sales environment. The Proception2 report describes the impact of an individual's DISC behavioral traits in a work environment.

The report generated by this analysis is designed to help individuals and management achieve a better understanding of this individual's behavioral style. It will provide helpful insight into the individual's behavioral strengths in sales and areas in need of possible improvement. The Proception2 report can also be used to develop strategies and methods to help individual's increase their personal flexibility in working relationships with clients, managers, peers and staff.

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**NOTE:** If this report is being used in the selection process, it is important to remember that it is not designed to recommend or not recommend any person for employment or hiring for a specific job or position. It is provided only as a tool to help those involved in interviewing a candidate develop interview questions for the interview and candidate evaluation process. A hiring decision should not be based only on this report or any other comparable report. This report and all selection reports should be used in accordance with applicable employment laws.

*This section reports on eight (8) key results areas relating to the business of selling. It describes how he attempts to achieve sales success. Use this information to better understand his approach to each of the key results areas discussed in this section.*

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## **Control of the Sales Process**

He will display real frustration when he feels the sales process is not going his way. Sam likes to approach the business of sales in a fast and spontaneous manner. He will attempt to verbally control the sales process. Sam wants to be the key person in the sales process. He will have other sales team members bring together the essential information, build the proposal and presentation that he will make to his prospects or clients. Sam does not like others suggesting how he should approach the sales process. He prefers the freedom to do it his way.

## **Competition**

Salespeople with Sam's behavioral style are often driven by the challenge and thrill of competition in nearly everything he does. He exhibits great confidence in his ability to make the sale. He brings a real sense of urgency to produce sales results. Sam enjoys sales contests because he can demonstrate his ability to have many sales activities going on simultaneously. Competition is stimulating for him as it gives him the opportunity to take risks in the sales process.

## **New Ideas and Change**

Sam will find it easier to prospect than salespeople with a different style. Sam is always looking for new methods and ideas to use in his approach to sales. He is always searching for new sales ideas, methods and techniques. In fact, Sam will experiment with a new close or presentation just to make the sales process more interesting. Don't expect Sam to use traditional sales methods and techniques. His comfort level with the unconventional lets him generate new and unusual approaches to the sales process.

## **Selling Style**

Sam will be more effective with his prospects and clients by being a better listener. His style of selling is to be working with multiple prospects and clients in various stages of the sales process. Sam does not like his sales role to become routine. He looks for ways to make his sales role interesting. He likes to move quickly through the sales process. Sam lets his prospect or client know his point of view and will often disagree with them if he thinks they are wrong.

## **Presentation**

Sam can create an unforgettable impression when making his presentation. Sam has a unique ability to make his sale presentation using a verbal paintbrush, creating word pictures for his prospects and clients. He will make a spontaneous, fast paced sales

presentation. Sam's presentation will cover a broad spectrum of information, often leaving out important details. With Sam's desire to try the unusual, he has the capacity to make up the presentation as he goes along. He will not avoid tough questions from his prospect or client.

### **Close**

He will attempt to close early in the sales process. He can be adept at using trial closes to determine where his prospect or client is in the buying cycle. Sam will attempt to make the sale with a new closing idea or technique. He can cause slower decision making buyers to be on their guard about doing business with him because of his passion to close the sale. He sees asking for the order as exciting and challenging. In fact, he doesn't like taking "no" for an answer.

### **Service**

He will often provide service only if there is an opportunity to make an additional sale. Follow through on service commitments is not one of Sam's greatest strengths. He must make a concerted effort to deliver what he promised to his prospects or clients. He wants the service segment of the sales process taken care of by someone other than himself. He wants to prospect and look for the next exciting sales opportunity. He must be aware that he may promise more service than he can personally deliver. He is already planning the next exciting, new sales call.

### **Response to Management**

Sam will readily accept challenges from his manager and will respond to competition from other sales team members. Better time management and personal organization can improve his/Her sales results. He responds best to a sales manager whom he respects and who brings excitement and innovation to the sales organization. He wants to work for a sales manager who will give him "yes" or "no" answers. He needs a sales manager who doesn't mind open discussions or even an argument from time to time.

*Most people have the ability to be flexible and use their intelligence to adjust their behavior to be productive in various sales environments. He has a sales environment in which he feels most comfortable. It is in this environment he will most often produce his best results. The statements printed below will provide an outline of his Preferred Sales Environment. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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- 1) Where he can sell in his own way
- 2) That allows him to be open and direct with his prospects and clients
- 3) With sales quotas and goals that are deadline oriented
- 4) Where he can use his quick wit and humor
- 5) where he can be a mentor to new salespeople
- 6) Where he can take a risk to achieve his goals
- 7) Where he can promote new products and services
- 8) Where he can use his ability to think fast on his feet
- 9) That is unpredictable, with opportunity and excitement
- 10) With a sales manager who will allow him to state his opinions without fear of retaliation
- 11) Where he can delegate the day-to-day details of the sales process
- 12) Where he can use his strong determination to close sales

*An important part of every organization is its ability to use the inherent strengths of each member of the sales team. The Sales Report report highlights potential behavioral traits and aptitudes he brings to the sales environment. This information will help him and the organization better understand and maximize his behavioral strengths. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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- 1) Self-starter
- 2) Accountable for his sales performance
- 3) Demands a lot of himself
- 4) Energized by group interaction
- 5) Energetic
- 6) Adjusts quickly from one client to another
- 7) Has a sense of urgency to move the sales process forward
- 8) Works hard for a progressive sales manager and organization
- 9) Works hard, plays hard
- 10) Generates new and unusual approaches to the sales process
- 11) Self-reliant and self-directed
- 12) Avoids getting caught up in all the details

*All motivation comes from within. Each behavioral style is driven by different motivational needs and desires. Performance improves when personal motivators are included in the work environment. While some of the Performance Motivators listed on this page are being met, there are others that are not. It will be helpful for him to note the motivators that are most important to him, but are not presently being incorporated into his daily motivation and supervision. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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## **Sam prefers:**

- 1) Others to be available when he may need them.
- 2) To operate in an innovative environment and have the opportunity to think outside the box.
- 3) An arena where he can compete.
- 4) A work environment charged in a positive manner.
- 5) Attention and praise in public for a job well done.
- 6) Time for group activities outside work.
- 7) Work that is general in nature.
- 8) An ability to set his own pace and not be tied to routine work or events.
- 9) The option to establish his work priorities.
- 10) An opportunity to work in an environment free of restriction, rules and directives.
- 11) Unconventional, new and different work or assignments.
- 12) The chance to live life to its fullest by being adventurous and uninhibited.

*As salespeople we often adjust our basic behavioral style to meet the requirements of a specific sales role. This section of the Sales Report report demonstrates how he adjusts his behavioral style to meet these requirements. The more this section is different from his Key Sales Results Areas, the more he may feel the need to adjust his behavior to meet the perceived demands of his present role in sales. Minor adjustments generally indicate self-assurance in his existing sales role.*

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## **Control of the Sales Process**

Sam will not hesitate to let other members of the sales team know what he expects and what must be done to bring the sale to a successful conclusion. When there is a need to involve other members of the sales team, he will give them the opportunity to contribute their ideas for solving his prospect's or client's problems. Sam wants to be the key person in the sales process. He will have other sales team members bring together the essential information, build the proposal and presentation that he will make to his prospects or clients. Sam is committed to using his own ideas and wants to make all key decisions involved with the sales process.

## **Competition**

Sam will work long hours, making a great personal effort to achieve sales success. His goal is to win sales contests. Sam wants to be seen and recognized as a sales winner. He likes the personal recognition and is motivated by it, but he feels it is equally as important to be compensated generously for his efforts. He is always ready to take on the next sales challenge. He relishes competition and has many sales activities in progress at the same time. He is self-reliant and enjoys being in contests where he can sell using his independent and free wheeling style.

## **New Ideas and Change**

He uses personal know-how and good judgment to decide what solutions will be most beneficial for his prospects or clients. He doesn't feel the need to accept and use others' sales ideas. However, the potential of a new idea can energize him. Adapting to new sales ideas or techniques is easy for him. In fact, Sam likes to discover and use the most innovative sales ideas or techniques. He will often criticize those who attempt to obstruct the implementation of new sales ideas, techniques or methods.

## **Selling Style**

Sam will ask his prospects and clients for their thought and ideas. He will want to have the opportunity to make his case, using supporting information to justify why they should buy his product or service. Decisions regarding prospects or clients and their needs are usually made quickly. Sam may put off completing important sales proposals and presentations due to all of his ongoing sales activities. Expect his selling style to be fast paced and unconventional. He will not be hesitant about challenging a prospect's or client's thinking or making his personal opinions known.

## **Presentation**

He can exhibit strong presentation skills and make a presentation that has impact. He likes to make a positive sales presentation. He will balance the presentation with enthusiasm, along with information to win over his prospects and clients. He seldom gives the same presentation. He likes to adapt and fine-tune his sales presentation to his prospects or client needs. He must make an effort to include necessary facts and information. Sam will not steer clear of tough questions from his prospect or client.

## **Close**

Sam must be careful that he does not build sales resistance by being overly assertive. Sam does not hesitate attempting to close a sale with new sales techniques. His intense selling style can cause him to lose sales because of his desire to get immediate results. He sees asking for the order as exciting and challenging. In fact, he doesn't like taking "no" for an answer and he will attempt to close the sale early and often throughout the sales presentation.

## **Service**

He will want to have others in his organization provide follow up and service to his prospects and clients when he feels the potential to do additional business with them is limited. He doesn't want to take care of all the details involved in finalizing the sale and providing ongoing service. He wants other members of the sales team to be responsible for servicing the prospect or client. Servicing the prospect or client once the sale has been made will be difficult for Sam. He is already planning the next exciting, new sales call.

## **Response to Management**

He wants to prepare his own sales goals without the involvement of his manager. He wants his sales manager to be available to listen and help when needed. Sam will often display dissatisfaction or frustration with management when he must attend sales training or sales meetings he feels is a waste of his productive time. He wants to work for a sales manager who will give him "yes" or "no" answers. Sam can give a conservative sales manager reason to worry because of his rebellious nature.

*Each of us prefers to see ourselves in a positive way. While he brings many outstanding strengths to his work environment, there are areas of his behavior which could impede his success. This section of the Sales Report report contains suggestions to consider relating to the behavioral tendencies that may slow or hinder his achievement of desired performance goals. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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**Sam may have a tendency to:**

- 1) Be a situational listener.
- 2) Often resist being a member of the team, unless he can lead the team.
- 3) Dislike a predictable and methodical environment.
- 4) Use the "halo" effect in appraising others' performance.
- 5) Work in spurts, which may not be permitted by the job.
- 6) Be overly trusting of others when delegating, while not taking time for proper instruction.
- 7) Keep too many balls in the air and fail to complete what he starts.
- 8) Have difficulty working in situations that require precision, coordination and patience.
- 9) Not understand or appreciate others whose style is not as active as his.
- 10) Attempt to push the envelope or walk on the edge.
- 11) Only want to follow those rules, regulations and procedures that he feels are warranted.
- 12) Be so unstructured that others cannot duplicate his results.

*Communication is the cornerstone of building relationships, achieving productivity and maintaining motivation. Communicating with him will be accomplished best by incorporating the recommendations outlined on this page. Using these recommendations with him will provide an opportunity to improve communications, reinforce relationships, promote credibility and gain increased productivity. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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## **When communicating with Sam do:**

- 1) Earn trust by being honest and direct.
- 2) Refer to the objectives and results often for the most effective interaction.
- 3) Increase the frequency and intensity of your eye contact.
- 4) Take care to not be redundant.
- 5) Be relaxed about a certain amount of fooling around.
- 6) Demonstrate concern about the human side of an issue or problem.
- 7) Be specific about what you want understood.
- 8) Provide as many options as possible.
- 9) Confirm that your message was understood.
- 10) Put your expectations in writing.
- 11) Be prepared to ask and answer questions.
- 12) Talk about results, not the process.

*Each of us knows how we prefer to have others communicate with us. We are aware of communications mistakes and errors that others make when communicating with us that lead to Communication Barriers. We know what we don't like others to do, say or use when communicating with us. When communicating with him, making an effort to reduce or eliminate the barriers emphasized will minimize the stress and frustration often created when communicating with a person of this behavioral style. Communication is the cornerstone of building relationships, achieving productivity and maintaining motivation. The number to the left of each statement listed below is used to keep record of the statement. It does not indicate a statement's order of importance.*

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## **When communicating with Sam don't:**

- 1) Gloss over problems.
- 2) Say, "Here's how I want it done."
- 3) Say you will get at it "as soon as possible."
- 4) Be demanding without specifying your reasons.
- 5) Be too philosophical; remain practical.
- 6) Let his lack of tact affect other team members.
- 7) Be disjointed with information or procedures.
- 8) Spend so much time in details, you don't get your ideas across.
- 9) Forget he wants you to move quickly with your communication.
- 10) Be put off by his confident nature.
- 11) Let him mistake your "no" answer for a "yes."
- 12) Expect him to be intimidated by your authority.

# Word Portrait

Sam Sample

*This page of the Sales Report report highlights words that can be associated with his behavior based on the DISC model. These words suggest how he prefers to do business as it relates to solving problems, working with others, reacting to the pace of the work environment and responding to guidelines and procedures established by others.*

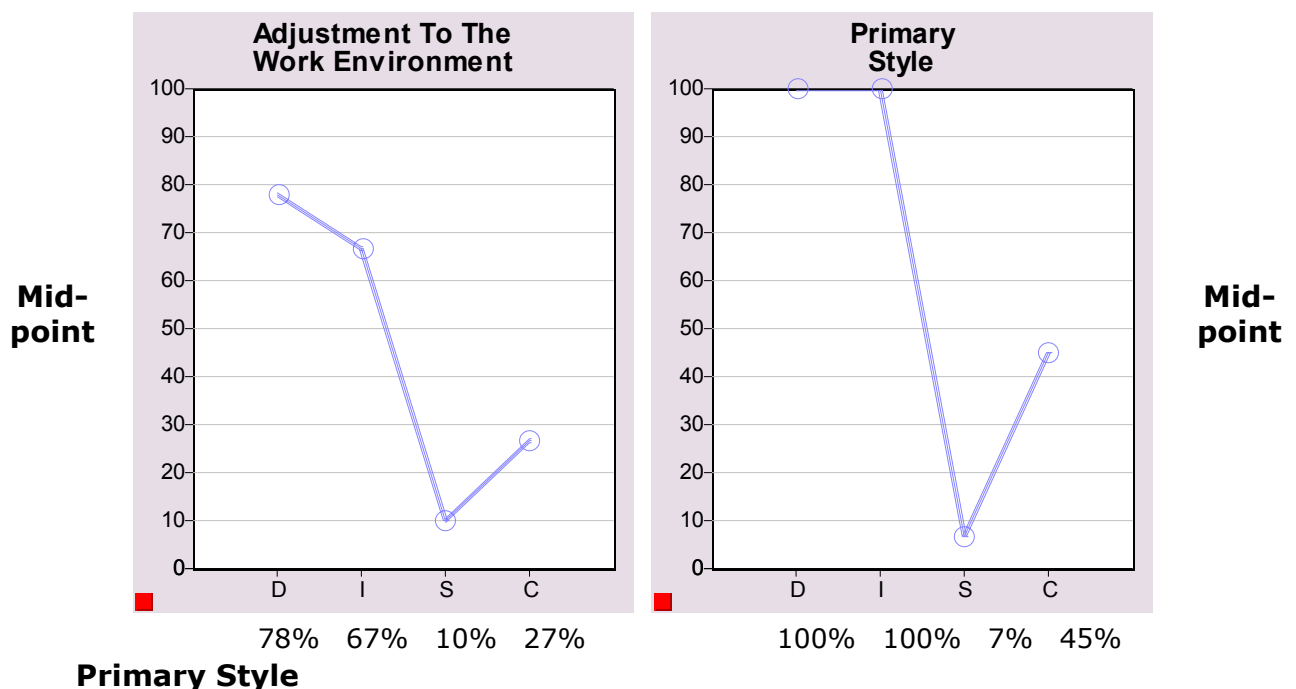
<b>Dominance</b>	<b>Influence</b>	<b>Steadiness</b>	<b>Compliance</b>
Challenging	Extroverted	Rigid	Painstaking
Self-Centered	Motivating	Undemonstrative	Wary
Relentless	Charismatic	Systematic	Meticulous
Driving	Subjective	Reluctant to change	Precise
Innovative	Spirited	Deliberate	Quality oriented
Strong-Minded	Expressive	Steady	Exacting
Resolute	Convincing	Unhurried	Accurate
Competitive	Animated	Consistent	Prudent
Goal oriented	Outgoing	Thoughtful	Compliant
Decisive	Upbeat	Reliable	Cautious
Assertive	Trusting	Careful	Organized
Enterprising	Warm	Unruffled	Neat
Strong	Friendly	Calm	Conservative
Determined	Congenial	Composed	Tactful
Positive	Sociable	Relaxed	Diplomatic
Purposeful	Contemplative	Eager	Steadfast
Reasonable	Objective	Quick	Original
Moderate	Cool	Unsettled	Self-reliant
Tentative	Doubting	Flexible	Confident
Reserved	Rational	Energetic	Bold
Uncertain	Logical	Animated	Stubborn
Accommodating	Questioning	Spontaneous	Independent
Conservative	Realistic	Restless	Unconventional
Cautious	Reflective	Versatile	Resourceful
Amenable	Analytical	Spur-of-the-moment	Autonomous
Unassuming	Critical	Dynamic	Opinionated
Humble	Calculating	Hurried	Individualistic
Restrained	Skeptical	Intense	Radical
Complacent	Introspective	Zealous	Fearless
Acquiescing	Reclusive	Impulsive	Reckless



## A Graphical Representation for Sam Sample

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Primary Style is the behavioral response that is most reflective of the "real person". This is often referred to as an individual's basic style. Over time the Primary Style is usually very consistent and will not change significantly.

### Adjustment to the Work Environment

Adjusted Style is an individual's behavioral response to their work environment. It reflects the behavior they feel will give them the best opportunity to succeed in their job. As an individual advances their career they will encounter new jobs or positions. An individual will often adjust their behavior to meet the needs and demands of a new work environment.

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