

PXT Select™

Sales: Coaching Report

Oliver Chase

CONFIDENTIAL

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INTRODUCTION

This report is intended to give you a deeper understanding of **Oliver Chase's** Thinking Style, Behavioral Traits, and Interests in relation to the position of **** Sample Sales Position for PXT Select ****. Along with some insight into Oliver's motivations and challenge areas, it will provide you with useful tips to aid in training and development.

What's in this report?

RESULTS SUMMARY

Assessment results are compared to the Performance Model, which shows the range of scores typical for success in the position

DEFINITIONS

Thinking Style and Behavioral Traits will be defined on the pages following the results summary

PERSONALIZED FEEDBACK

You will receive feedback personalized for the individual based on the results and how they should be interpreted

What does the assessment measure?

THINKING STYLE

- Thinking Style is the ability to process information.
- It includes problem-solving, communication, interaction, and learning skills.
- Results are illustrated on scales ranging from 1 to 10.
- A higher score is not necessarily the best indicator of on-the-job performance.

BEHAVIORAL TRAITS

- Behavioral Traits are commonly observed actions that help define who someone is.
- Each scale is defined by two opposing, but equally valuable, end points.
- One side of the continuum is not better than the other.

INTERESTS

- The Interests section may predict motivation and potential satisfaction with various jobs.
- These are ranked in order from the highest- to lowest-scoring interest.

Distortion was not detected in this report. What does that mean?

Some candidates may answer in a way that is socially desirable or to make themselves look better, rather than respond candidly and risk disapproval. Based on these assessment results, it appears that **Oliver answered candidly**.

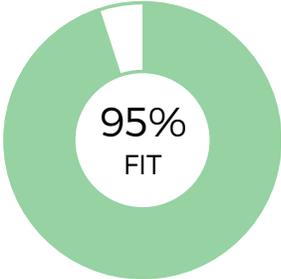
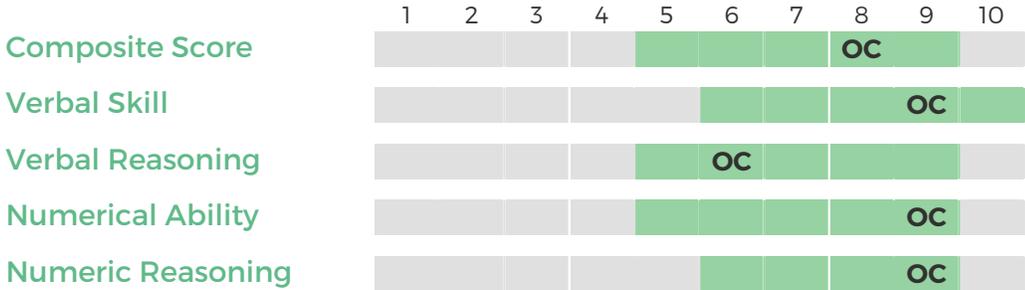
** SAMPLE SALES POSITION FOR PXT SELECT **

Oliver Chase

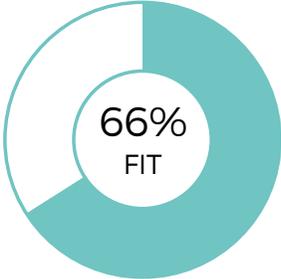
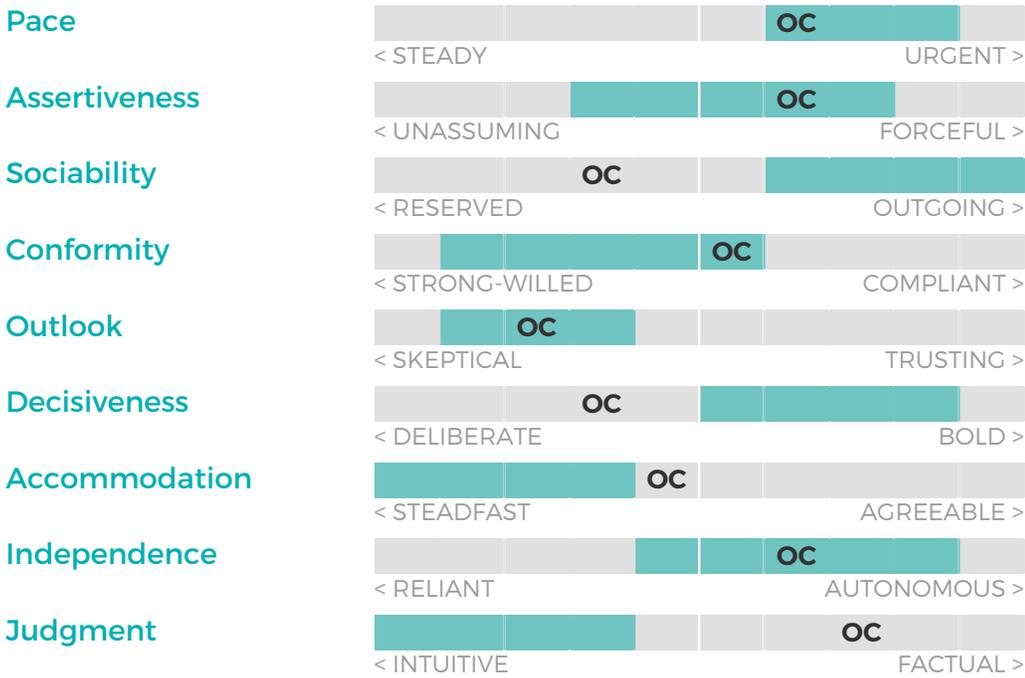


Performance Model = highlighted boxes; Oliver's placement = initials

THINKING STYLE



BEHAVIORAL TRAITS



INTERESTS

OLIVER

in rank order

TECHNICAL

CREATIVE

FINANCIAL/ADMIN

ENTERPRISING

PEOPLE SERVICE

MECHANICAL

TIED

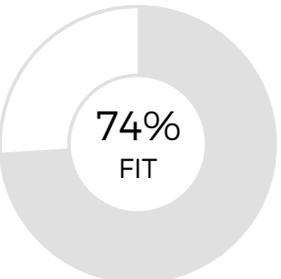
PERFORMANCE MODEL

in rank order

ENTERPRISING

PEOPLE SERVICE

CREATIVE



COMPOSITE SCORE

Thinking Style

Composite Score A reflection of overall learning, reasoning, and problem-solving potential

The Composite Score is the combined score of the four other Thinking Style scales. Because looking at a person's Thinking Style comprehensively is most effective in a coaching context, it is the only Thinking Style scale discussed in this report.



- Oliver fits the Performance Model for the Composite Score.
- Oliver tends to learn quickly and understand complex information without difficulty.

What you need to know about Oliver:

- Oliver is an effective learner who may appreciate a challenge while training on a new sales product.
- Oliver solves problems effectively, considering solutions from many different perspectives.
- Without challenge in a training program, you may lose Oliver's full attention.
- Oliver's capacity to adapt to various training situations and to various approaches to the sales process is very strong.
- Oliver learns easily and can apply that learning to the requirements of working with a new client or job situation.

Management tips:

- Keep workload and training opportunities challenging enough so that Oliver doesn't get bored and lose interest.
- Invite Oliver to apply problem-solving skills to challenges within the department and with challenging sales prospects.
- If others need more time to learn a shared task or a new product, provide Oliver with additional, meaningful work to maintain engagement.

BOTTOM LINE:

Oliver is highly responsive to sales training programs, changes to processes, and new products at many levels of complexity.

PACE

Behavioral Traits

Pace Overall rate of task completion

< STEADY

URGENT >

OC

- Oliver fits the Performance Model for Pace.
- Oliver tends to be fairly driven and works at a moderate to fast pace.

What you need to know about Oliver:

- Oliver typically acts with a sense of urgency under routine sales conditions.
- Oliver generally prefers to work at a slightly hurried pace.
- Usually, Oliver starts sales assignments in a timely manner.
- Most likely, Oliver prefers to avoid sedentary or repetitive work.
- Oliver may seek to implement new ideas with urgency.

Management tips:

- Work together to set sales deadlines and quotas that you're both comfortable with.
- Ask Oliver to slow down when you think more concentration would be beneficial.
- To help keep Oliver engaged, provide opportunities to take on new responsibilities.

BOTTOM LINE:

Oliver responds well to time constraints and generally works at a brisk pace.

ASSERTIVENESS

Behavioral Traits

Assertiveness Expression of opinions and need for control

< UNASSUMING

FORCEFUL >

OC

- Oliver fits the Performance Model for Assertiveness.
- Oliver tends to be fairly comfortable sticking up for opinions and needs.

What you need to know about Oliver:

- Oliver tends to be motivated when held accountable for results.
- Oliver is willing to be assertive, to be more of a leader than a follower.
- Oliver typically uses direct statements in sales negotiations.
- Oliver will likely present a sales pitch with a fair amount of confidence.
- At times, Oliver may be overly assertive when negotiating sales.

Management tips:

- Provide positive feedback when Oliver engages in active listening rather than just pushing an agenda.
- If you notice that Oliver tends to dominate in sales situations, provide feedback suggesting that clients be allowed more opportunity to express their doubts.
- Provide opportunities to lead discussions if Oliver appears to have a desire to do so.

BOTTOM LINE:

Oliver takes on leadership roles comfortably but is still willing to listen to others' perspectives carefully when the situation calls for it.

SOCIABILITY

Behavioral Traits

Sociability Desire for interaction with others

< RESERVED

OC

OUTGOING >

- Oliver does not fit the Performance Model for Sociability.
- Oliver tends to be fairly introverted and may often prefer to be alone.

What you need to know about Oliver:

- Oliver may be somewhat uncomfortable as the center of attention.
- Oliver expresses moderate enjoyment of the aspect of sales involving contact with clients.
- Oliver tends to prefer working with a detached, task-oriented style of sales service.
- Oliver may prefer to accomplish sales in a more formal, "strictly business" fashion.
- Oliver can likely work well without relying on strong personal relationships.

Management tips:

- Ask Oliver what types of communication are preferred (email, phone, one-on-one, etc.).
- Encourage socializing with fellow salespeople, prospects, and clients, but also recognize that this may be somewhat draining for Oliver.
- Maintain a casual demeanor with Oliver, encouraging a more open and relaxed way of communicating with others.

BOTTOM LINE:

Oliver tends to prefer an impersonal sales style.

CONFORMITY

Behavioral Traits

Conformity Attitude on policies and supervision

< STRONG-WILLED

COMPLIANT >

OC

- Oliver fits the Performance Model for Conformity.
- Oliver tends to be cooperative and usually works within the rules.

What you need to know about Oliver:

- Oliver is typically willing to accept guidance and suggestions from those in authority.
- Oliver is friendly, cooperative, and likely fairly easy to manage.
- Oliver demonstrates a positive attitude concerning organizational constraints and restrictions.
- Oliver should be willing to conform to sales policies without feeling any loss of personal freedom.
- Oliver will usually accept the advice and criticism of sales managers.

Management tips:

- Encourage free thinking and reward efforts to develop creative solutions to accomplishing sales tasks, even if they contradict established procedures.
- Acknowledge the importance of procedural requirements, but encourage personal expression in areas that don't need as much regulation.
- Demonstrate in your daily work how it is acceptable to bend the rules within the limits of your organizational culture.

BOTTOM LINE:

Oliver responds well to a regulated sales environment and is willing to accept external controls.

OUTLOOK

Behavioral Traits

Outlook Anticipation of outcomes and motives

< SKEPTICAL

TRUSTING >

OC

- Oliver fits the Performance Model for Outlook.
- Oliver tends to be skeptical and looks for the evidence to back up a claim.

What you need to know about Oliver:

- Oliver typically has a guarded outlook on how well things are likely to turn out.
- Oliver may express doubts about the outcome of sales, appearing pessimistic.
- Oliver may be skeptical of people's motives in sales negotiations, especially when emotional appeals are involved.
- Oliver may question changes in policies or the sales process and usually prefers to know why they were enacted.
- Oliver will almost always focus on the risks and potential consequences of sales opportunities, considering potential clients' motives carefully.

Management tips:

- Consider Oliver's tendency to second-guess to be an asset when determining the merit of new ideas.
- Encourage Oliver to get to know clients so Oliver may be less questioning of their motivation.
- Encourage Oliver to ask for evidence when problem solving, but don't allow digging in of heels or argument about potential risks just for the sake of argument.

BOTTOM LINE:

Oliver functions best when encouraged to use vigilance and caution to regularly question sales situations.

DECISIVENESS

Behavioral Traits

Decisiveness Use of speed and caution to make decisions

< DELIBERATE

OC

BOLD >

- Oliver does not fit the Performance Model for Decisiveness.
- Oliver prefers to take some time to think carefully before making a decision.

What you need to know about Oliver:

- Oliver is capable of making timely decisions during sales negotiations, but may hesitate when under stress.
- Oliver usually takes time to collect supporting information and data before drawing conclusions.
- Most likely, Oliver will carefully weigh the risks of a situation before making a decision.
- If Oliver feels disorganized or ill-prepared, important decisions during the sales process may be delayed.
- Oliver likely prefers to have a reasonable amount of time to consider significant decisions.

Management tips:

- Encourage Oliver to find a constructive way to evaluate ideas, such as listing pros and cons.
- Set a clear deadline for when you require an answer.
- Give Oliver opportunities to make smaller or less critical decisions in a more timely fashion.

BOTTOM LINE:

Oliver prefers to make careful, informed decisions, but can be convinced to move quickly when urgency is required.

ACCOMMODATION

Behavioral Traits

Accommodation Inclination to tend to others' needs and ideas

< STEADFAST

OC

AGREEABLE >

- Oliver does not fit the Performance Model for Accommodating.
- Oliver is willing, in most circumstances, to express disagreement and defend opinions.

What you need to know about Oliver:

- Most of the time, Oliver will take a stand for what Oliver feels is right.
- While usually willing listen to others' perspectives, Oliver will likely stand by a position if there is a disagreement.
- Oliver probably won't let others take advantage during sales negotiations.
- Oliver can be agreeable and cooperative with clients, but does not go along just to get along.
- Oliver might be less likely than others to avoid arguments, disagreements, and/or conflict during the sales process.

Management tips:

- When necessary, remind Oliver to seek out common ground with clients as needed.
- Reward any attempts Oliver makes to seek out the agreement of the team.
- Recognize the value of expressing a differing opinion, but be mindful that this doesn't create a hurtful or negative environment.

BOTTOM LINE:

Oliver responds appropriately to the needs of clients but rarely suppresses personal opinions.

INDEPENDENCE

Behavioral Traits

Independence Level of preference for instruction and guidance

< RELIANT

AUTONOMOUS >

OC

- Oliver fits the Performance Model for Independence.
- Oliver often likes to set the direction.

What you need to know about Oliver:

- Oliver generally prefers little instruction when carrying out sales negotiations.
- On occasion, Oliver may want some guidance and instruction to complete the sales transaction.
- Oliver is usually self-sufficient and willing to independently take on new sales developments or clients.
- Oliver prefers to decide the course of action in most sales situations.
- Oliver is comfortable solving problems and handling situations independently when necessary.

Management tips:

- Give Oliver a reasonable amount of control over work.
- If Oliver is working independently, check in from time to time to make sure everything is on track.
- When you need to limit Oliver's freedom, make sure you explain why it's necessary.

BOTTOM LINE:

Oliver is moderately independent but still accepts necessary guidance and instruction.

JUDGMENT

Behavioral Traits

Judgment Basis for forming opinions and making decisions

< INTUITIVE

FACTUAL >

OC

- Oliver does not fit the Performance Model for Judgment.
- Oliver tends to base decisions wholly on the facts of the matter.

What you need to know about Oliver:

- Oliver probably needs to see all the facts before determining a solution for a client.
- Oliver exceedingly relies on objective data when determining appropriate sales solutions.
- Oliver may frequently discount the value of personal feelings and circumstances when making decisions.
- Oliver attends to potential problems by examining factual information.
- Oliver has a tendency to take a very objective view to reach conclusions during sales negotiations.

Management tips:

- If Oliver is required to make a sales decision without the benefit of hard data, encourage the expression of concerns or caveats associated with the decision.
- Show Oliver the value of gathering subjective opinions, including Oliver's own, to make well-rounded decisions during selling situations.
- When there is too much information to sift through or all options seem to be favorable, encourage Oliver to make decisions based on overall impressions.

BOTTOM LINE:

Oliver heavily focuses on the factual information available to make judgment calls and decisions.

INTERESTS

OLIVER'S ORDER OF INTERESTS

Ordered from highest- to lowest-scoring interest

Interests from the ** Sample Sales Position for PXT Select ** Performance Model are bolded
Ties are indicated if present

TECHNICAL

CREATIVE

FINANCIAL/ADMIN

ENTERPRISING

PEOPLE SERVICE

MECHANICAL

} TIED

What is Oliver most interested in?

Technical: Technical aspects of the sales process appear to interest Oliver, who is most likely interested in sales presentations that involve research, theories, and the application of technical information. Oliver may be particularly interested in analytical or conceptual tasks that require critical thinking.

Creative: Creativity is one of Oliver's top interests. This means that Oliver is probably motivated by innovative or imaginative sales pursuits. Whether it involves designing new things, coming up with ideas, or figuring out a way to do something better, this aspect of the sales process can help enhance job satisfaction.

Financial/Admin: Oliver appears to be interested in the Financial or Administrative side of selling situations and is therefore likely to organize sales-related information in order to make the selling process more efficient. Classifying and managing information may be a main source of motivation.

Enterprising: Seeking out Enterprising pursuits or leadership may be of primary interest. It's likely that Oliver will use persuasiveness to close the deal. Also, Oliver will probably be attracted to activities that allow for networking or the discovery of new prospects.

BOTTOM LINE:

Oliver will likely enjoy the Creative and Enterprising aspects of the job. However, Oliver may not find People Service activities as motivating as other salespeople who have been successful in this position.