

Sales Manager's Coaching Report

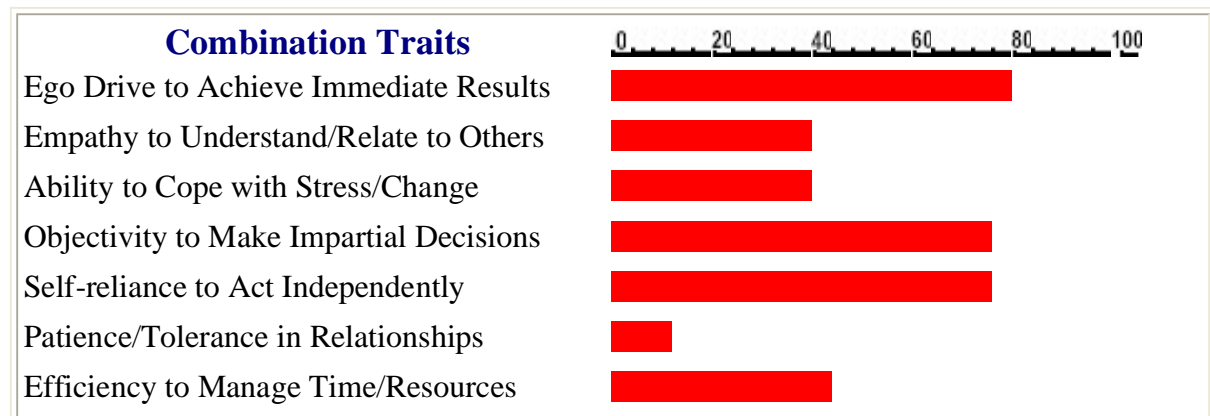
For John Sample

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 salesperson 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. Due to weighting and averaging, these Combination Traits (see below) are slightly less predictive than the "Basic Eight" traits. Nonetheless, they can still be quite valuable when coaching or supervising your staff. However, the Coaching Recommendations contained in the following pages are based purely upon the "Basic Eight" primary traits which are highly predictive of an individual's behaviour. Therefore, expect minor contradictions between the secondary traits and these Coaching Recommendations.

Selection Scales	VERY LOW	LOW	MOD	HIGH	VERY HIGH
Sd (Social Drive)			51		
Sc (Social Confidence)				74	
Go (Goal Orientation)					100
Nc (Need for Control)					91

Coaching Scales	VERY LOW	LOW	MOD	HIGH	VERY HIGH
Do (Detail Orientation)		36			
Sk (Skepticism)					81
Gi (Good Impression)	7				
Nn (Need to Nurture)	9				

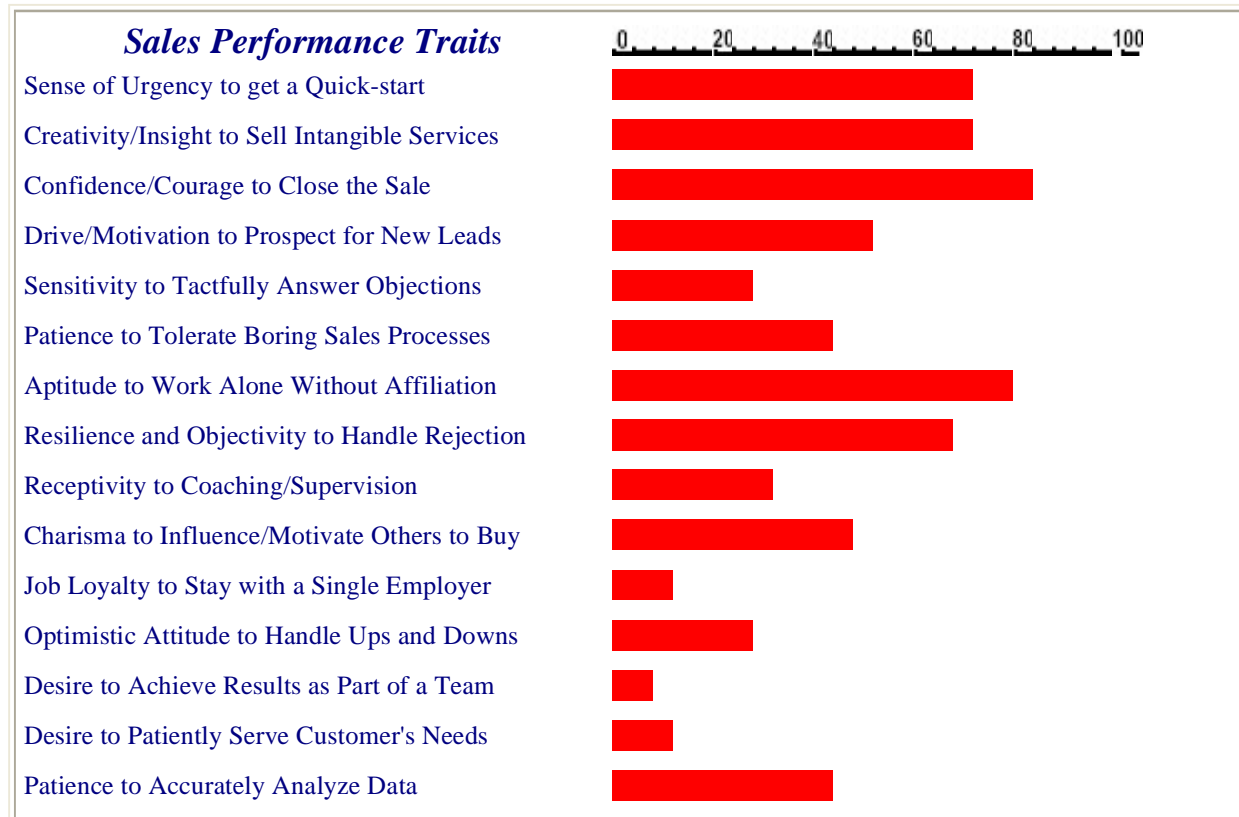


Sales Performance Traits

For John Sample


For each of the following job duties, your salesperson receives a single percentile score that describes his or her compatibility, based upon his/her unique personality & associated motivation. High (61%-80%) and Very High (> 81%) scores indicate good compatibility with that job duty while Low (21%-40%) and Very Low (< 20%) scores indicate a lack of compatibility that may require training and will definitely absorb management time and attention.

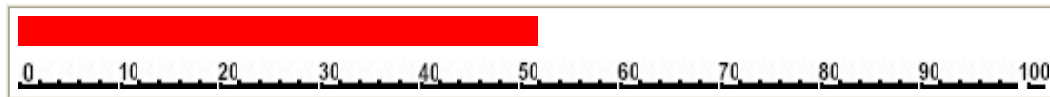
It is important to note that these Sales Performance Trait scores only relate to your salesperson's personality and motivation, not intelligence, sales skills or self-discipline. If he/she receives a Low or Very Low score on any Sales Performance Trait listed below, compensation in the form of additional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



Sales Manager's Coaching Report

For John Sample

Social Drive 



Summary Statement--When individuals score in this moderate range on any personality scale, they are characterised by contrasting behaviours typical of both above and below average scores but without the extremes. Because Mr. Sample will display behaviours characteristic of both high and low scores on this scale, his behaviour is often unpredictable. Therefore, Mr. Sample is inconsistently motivated by status, prestige, and other forms of public recognition. As a result of this moderate need for public recognition, he is often selective in the way he makes friends and acquaintances. Instead of impulsively meeting people at parties and other social events, he prefers to build relationships through professional referrals and seminars. In the sales presentation, his overall preference is consultation selling where he is not required to change his personality, beliefs, or philosophies in order to make the sale. Though he has the personality to entertain others, it is moderated by his score on this scale. Unlike the salesperson with a very high "Sd" score who is constantly looking for feedback and recognition, Mr. Sample's moderate score causes him to be more controlled and less impulsive. He will be inconsistently motivated by contests, awards, performance leagues or other forms of public recognition. Since he isn't always motivated to be with others, he may choose to spend his time pursuing either advanced education or management opportunities where he isn't required to compete against others. Though he is relatively outgoing, he is not typically motivated to be the "Jack of all trades" salesperson who can sell "ice cubes to Eskimos."

Coaching Recommendations - - Mr. Sample is inconsistently motivated to collect casual acquaintances purely for the purpose of selling to them. As a result, there are times when he will lose his motivation to prospect for new business. Keep track of his prospecting activity and when it begins to fall, meet with him and recommend different markets or introduce different systems that increase his flow of prospective buyers. If he has the self-discipline to do all those things that unsuccessful reps fail to do and you are closely monitoring his numbers, prospecting activity should increase. Otherwise he will begin to depend upon existing clients for new business and overall productivity will eventually fall. To maximise his chances of early success, Mr. Sample should also have a relatively large natural market, numerous centres of influence, and a specific market niche that is compatible with his personality and interests. Help him prioritise consistent, high levels of prospecting activity early in his career and delay encouraging the pursuit of advanced qualifications and management opportunities until he establishes a consistent discipline to prospect for new business. When meeting with him, attempt to reinforce his mission or purpose for originally entering the industry or profession. Try to understand his personal needs (children's education, a new house, bigger pension fund) and then discuss the activity requirements (not sales or volume requirements) that will help to satisfy those needs. Help him meet personal activity requirements by volunteering to hold him accountable. You might even agree to "chart" his weekly prospecting and opener activity for a 90-day period and provide improvement opportunities in regular one-on-one meetings during that time. You can increase his motivation by converting his activity goals (that are based upon his expectations) to activity commitments (that are based upon his integrity/character). Once Mr. Sample "buys in" to the 90-day activity commitment, reinforce it by a handshake and a written, signed statement.

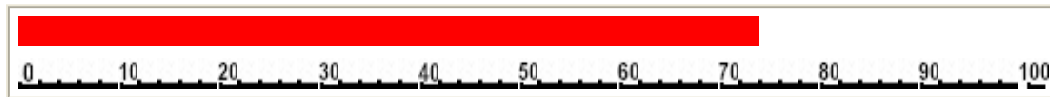
(Sd2)

©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Social Confidence 



Summary Statement - - Mr. Sample has the social self-confidence and assertiveness to make the presentation, answer the objections and close the sale. From the initial interview to the assumptive close, he 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 his 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 salespeople 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 Mr. Sample's "Sc" score approaches 100%.

Coaching Recommendations - - Because Mr. Sample'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 his sales effectiveness. In this case, he may be so matter-of-fact and "on task" that he fails to provide the interpersonal warmth necessary to bond with the buyer. He may not prioritise the customer service job duties that require nurturing. This problem will be compounded significantly if his Goal Orientation score is high (See "Go" score on previous page). Not only will he occasionally lack the sensitivity required to provide customer service, but his goal-orientation will produce impatience and intolerance for anyone who keeps him from reaching his objectives. To minimise any of the negative affects of these interactions, train Mr. Sample to eliminate objections before they arise to avoid direct confrontation. If in direct sales, when Mr. Sample encounters the "No Money" objection, he should always get a solid financial commitment before proceeding to the close. "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 Mr. Sample's professionalism and the quality of the company and its products are emphasised.

Join Mr. Sample 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 his matter-of-fact approach. In addition, many sales training courses provide helpful recommendations and group participation to overcome ineffective behaviours in this area.

(Sc3)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Goal Orientation 



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

Coaching Recommendations - - Mr. Sample does not need to be externally motivated in the traditional way since he is internally, highly driven to reach short-term goals. As long as the goal is desirable, well defined, and attainable, he will devote significant time and energy to attaining it. First, discover what it is that most motivates him. 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 he "buys into" a weekly commitment to such meetings that is realistic and attainable. Beware of his 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 he will have high productivity one month and low productivity the next. To reduce staff turnover amongst Racehorses, it is imperative to keep their pipelines 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 Mr. Sample has face-to-face openers with enough prospects, his 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 Mr. Sample's intense work effort and the desired results. If he is unable to achieve early success, he 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 legal compliance requirements, or an authoritative manager who does not respect his need for autonomy and creativity.

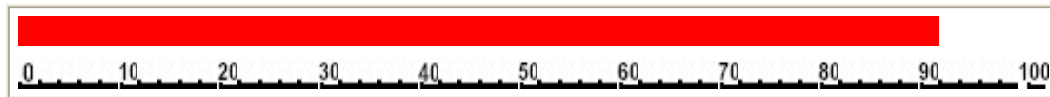
Important Note: It is important to note that Racehorses are restless and thrive on variety and change. Approximately every two years, Mr. Sample will get bored with the status quo and attempt to change something significant to help him avoid burnout. It is up to the manager to understand this periodic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

(Go3)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Need for Control 



Summary Statement - - At times, Mr. Sample's desire for harmonious relationships with colleagues and managers is in conflict with his need for control and independence. If he is forced to work with other salespeople on major accounts, he is more likely to maintain control than defer to others. In selling situations, he often appears overly concerned with "being in charge" of a given situation. While he may appear aggressive at times, Mr. Sample simply seeks to have control over the outcome of his work. He feels most at ease when in control of his commitments and in situations where he is not forced to follow rigid guidelines in making sales. He will prefer working in situations that minimise 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 his 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%.

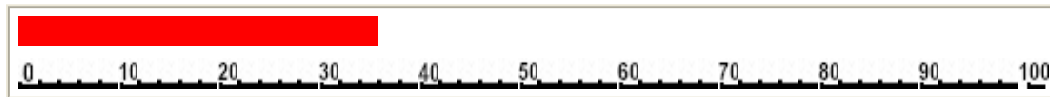
Coaching Recommendations - - Even prior to being hired, potential conflicts between Mr. Sample's need for control and the job requirements should be discussed. For example, if weekly activity reports are required, this fact should be emphasised and agreed upon in advance as well as other requirements such as training, joint field work, supervisory meetings, etc. Remember that Mr. Sample'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 him know that he no longer has to attend sales training meetings if he 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 he must give up control to maintain harmony. In situations that require shared sales commissions or shared responsibilities, for example, Mr. Sample's need for control can negatively impact relationships in the office, especially when his 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 him 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 organisation is too autocratic and inflexible. Management should always be aware of Mr. Sample's level of frustration with rules and requirements and be sensitive to his needs.

(Nc3)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Detail Orientation



Summary Statement - - Though Mr. Sample may have the intelligence to handle facts, figures, and detailed analysis, he does not enjoy spending much time or energy in this area. Instead of spending time in the proposal, planning, and education/technical training process, he will choose to spend more time in the actual selling process, relying upon his intuitive insight, feelings and experiences to make the sale. He 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 Mr. Sample's low "Do" score become more obvious as his score approaches 0% and less obvious as the score approaches 40%.


Coaching Recommendations - - From the earliest stages of Mr. Sample's sales career, inform him of this tendency to avoid detailed analysis and its potential impact upon his productivity. If he 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 prioritise the sales preparation, planning, and qualification processes. When the initial signs appear, quickly reinforce an accountability process, which helps to minimise the problem. For example, if he is not properly completing the application or order form, return the form immediately to him with a personal note. If he is not completing his activity reports, tie their completion to the payment of commissions and/or expenses (if possible) and delay these until the paperwork is properly completed. If necessary, meet with him on a regular basis to review the activity reports until their completion becomes a regular habit. Mr. Sample can be motivated to handle the details by rewarding him 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 him with his 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 Mr. Sample's first year. During this joint fieldwork, look for inadequate qualification, inaccurate calculations, proposals that lack necessary details or compliance information and "broad brush" 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, Mr. Sample can show signs of poor concentration. This problem may require managers to spend additional coaching time helping him attend to the job duties that require intense concentration and attention to detail (compliance, activity reports, call ratios, etc.).

(Do1)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Skepticism 



Summary Statement - - Mr. Sample either 1) lives in a high crime area; 2) has been taken advantage of by others; and/or 3) has been brought up to distrust other people in general until they earn his 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 his attitude and cause communication problems with prospective buyers, fellow employees and management. When it comes to prospecting, he can be too selective in qualifying who he 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 he can consider the referral process as an invasion of the prospect's or client's privacy. When it comes to relationships with other employees, he 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. Mr. Sample can occasionally see things as "black and white" and find it difficult to see the "greys" or mitigating circumstances. As a result, slight problems in communication can grow to adversely affect relationships. When working with the manager, Mr. Sample may have the same problem. Rather than giving the manager the "benefit of the doubt" when the manager makes a mistake, Mr. Sample could pre-judge the manager as not being worthy of his trust. As a result, the manager may feel threatened and begin to close down communication, reinforcing his distrust and jeopardising the long-term relationship. These comments become less obvious as Scepticism ("Sk") score approaches 61% (see above) and much more obvious as the score approaches 100%.

Coaching Recommendations - - The manager should encourage Mr. Sample to be more versatile when it comes to prospecting for new leads, especially as it relates to "warm" lead generation, such as referrals and centres of influence. During any probationary or trial period of employment, it is important to encourage the most efficient prospecting methods. Help him to find a target market in which he can feel comfortable, and then directly supervise the referral generation process by holding him accountable for a consistent prospecting effort. Make sure he is accurately assessing the quality of his prospective buyers and not ignoring markets that he has pre-judged as having low potential. To open the communication process and prevent Mr. Sample's low trust from adversely affecting relationships, encourage him to discuss areas of dissatisfaction and frustration and act upon each area immediately, reporting back to him as soon as possible. Any agreements involving money or incentives should be spelled out in writing to avoid misunderstandings. Immediately resolve problems between him and his 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."

(Sk3)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Good Impression 



Summary Statement - - Mr. Sample was given ample chance to exaggerate strengths and downplay weaknesses while taking the CPQ, but instead chose to be open, frank, and even self-critical at times. He provided such self-disclosure that there was no attempt to leave a favourable impression. Traditional ego-defences (rationalisation, denial, etc.) were not employed to protect him against criticism. These low "Gi" scores, though a distinct "plus" when it comes to coach-ability and open communication with management, can result in a "thin skin" which is more affected by rejection. When he is criticised, he will first look at personal behaviour rather than blame others or deny the criticism. In addition, if a product or service is competitively weak in the marketplace, he may have difficulty selling it, since he is unwilling to exaggerate the strengths of the product to make a sale. Recent research has found that individuals who respond to the CPQ questions in this way produce more accurate/valid test results which can be depended upon for selection, supervision, and training. It should be noted that these comments regarding this range of low "Gi" scores (0%-40%) are easier to recognise when his score is closer to 0% and less obvious when the score is closer to 40%.

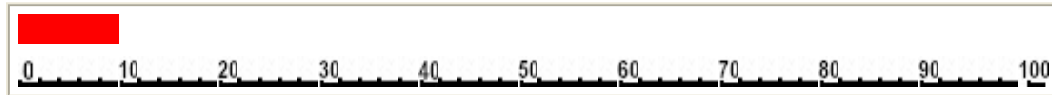
Coaching Recommendations - - Since Mr. Sample must thoroughly believe in the products and services, the manager will be required to spend significant time and effort training him before he feels confident about selling. Because he requires others to be just as open and frank, it is most important that the manager avoid exaggerating the product's benefits when training him. If the manager attempts to cover-up a product's shortcomings or exaggerates the product's features beyond truth, Mr. Sample will find it difficult to work for that manager and question the integrity of the organisation. A lack of confidence in the products should not be misinterpreted as a lack of social confidence (which is measured by the "Sc" scale). If he loses his enthusiasm or motivation, first find out if he sincerely believes in what he is selling. If the problem is a lack of belief, emphasise the competitive strong-points and relate these features to the benefits for the customer. For example, if the product/service is initially more expensive, demonstrate the long-term competitive advantages and show how his clients will benefit. When he receives a lot of criticism or rejection in a short time period, the manager needs to de-personalise it and emphasise the importance of ratios. For example, explain that if only two out of eight prospects convert to sales, six prospects will not buy the product, and one of those may even be critical or rude. If he can expect the rejection as part of the job description and know that he is one step closer to a sale, the feelings of rejection can be minimised. In addition, the manager can emphasise the fact that the prospect is only rejecting the products/services, not Mr. Sample. Quite often the prospect has very personal and private reasons for making a decision not to buy certain products/services which have absolutely nothing to do with him. Mr. Sample's ability to discuss his faults, fears, or failures is a real opportunity for the manager to provide constructive supervision. Simply ask and be open to listening carefully. Since he will avoid exaggerations, his comments or even criticism can be taken quite literally as his real and honest perceptions.

(Gi1)
©Copyright 2000, CraftSystems Inc.

Sales Manager's Coaching Report

For John Sample

Need to Nurture 



Summary Statement - - Mr. Sample has a low sensitivity to the needs of others and an inability to express warm and loving emotions. He will initially find it difficult to assess the personal feelings, emotions, and needs of prospective buyers. He will typically gravitate over time to an "office hours" role selling products to businesses and professionals who do not require an intimate, nurturing relationship. In the sales call, the rapport building part of the presentation is likely to be brief as he moves directly to the formal fact-finder and close. If he is working with professionals where rapport building is not as important, this should not pose a problem. However, during his early months in the business when everyone's a prospect, it could jeopardise a sale. As a result of this low "Nn" score, if selling directly to consumers, there will be times when he misses sales opportunities that result from personal referrals. Since Mr. Sample does not naturally spend a lot of time solving the personal problems of others, he 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 his habits, hobbies, and interests. On the other hand, this low score can contribute to low insight into the buyer's needs and low prioritisation 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, if possible, Mr. Sample would rather delegate these job duties to someone else. If he works in a smaller office or a branch office that does not provide the luxury of staff support personnel, he may overlook his customer service duties. These comments become less obvious as his "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 he is thinking or feeling. When Mr. Sample 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 his feelings and frustrations and offer assistance if it is needed. Early in his career, consider directing him to work in markets selling directly to consumers. 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 he 1) has a significant existing professional/business client base, 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 him (or pair him with a senior salesperson). Mr. Sample should be trained thoroughly in the rapport-building process and taught how to secure and pursue personal referrals. The manager should join him on 3-4 sales openers, fact-finders, and closes to make sure he is empathising with the prospect and properly assessing the prospect's needs and concerns. The manager should also monitor his customer service and follow-through processes.

(Nn1)
©Copyright 2000, CraftSystems Inc.

[Sales Charts/Reports](#) | [Leadership Charts/Reports](#) | [Administrative, Technical....](#) | [Contact Us](#) | [Suggestions](#)