



Sales Profile Report

Prepared For:
Sam Sample

Provided By:
Professional Development Training Pty Ltd

Date:
August 30, 2012

pdtraining
professional development training



Introduction

This Sales Profile Report (SPR) is a sales coaching tool that identifies two primary factors of an individual's personality style and explores how these factors may impact the individual's approach to the various stages of the sales cycle. The two primary factors measured are referred to as *Achievement Drive* and *Relational Drive*.

Achievement Drive indicates the manner in which an individual plans for and approaches the activities of the sales process. This would include planning, presenting and closing. *Achievement Drive* is expressed as *METHODICAL* at one extreme and *URGENT* at the other. *Relational Drive* indicates the manner in which an individual relates to and interacts with others. This would include prospects, customers and team members. *Relational Drive* is expressed as *GUARDED* at one extreme and *EXPRESSIVE* at the other. The relative measures of these factors combine to reveal one of four Sales Profiles:

- Consultative Counselor
- Adaptive Coach
- Directive Driver
- Contemplative Advisor

The following essential elements comprise the contents of this report:

Profile Grid

The Profile Grid is a visual representation of the four Sales Profiles. Each profile occupies a specific quadrant of the Profile Grid based on its relative measures of *Achievement Drive* and *Relational Drive*. These quadrants are color-coded to differentiate one from the other and aid in the interpretation.

Sales Cycle

The sales cycle described in this report is comprised of seven common steps, ranging from developing prospects to servicing the client after the sale is closed. The four Sales Profiles may approach various steps of the cycle differently, each with its own strengths and challenges relative to expressions of *Achievement Drive* and *Relational Drive*.

Additional insight is provided to an individual's most likely approach by examining the degree of influence specific dimensions of personality have on each step of the sales cycle.

Development Points

Development Points, unique to each profile, are helpful in facilitating individual sales coaching efforts. These points include categories such as: Dealing with Rejection, Managing Conflict, and Adjusting the Approach. Also examined are motivational topics that pertain to each Sales Profile, including: Motivating Factors, Demotivating Factors and Recognizing Performance.

Probing questions

Finally, a number of probing questions are provided to guide the reader in considering the relative implications each style brings to a particular sales environment or organizational culture.



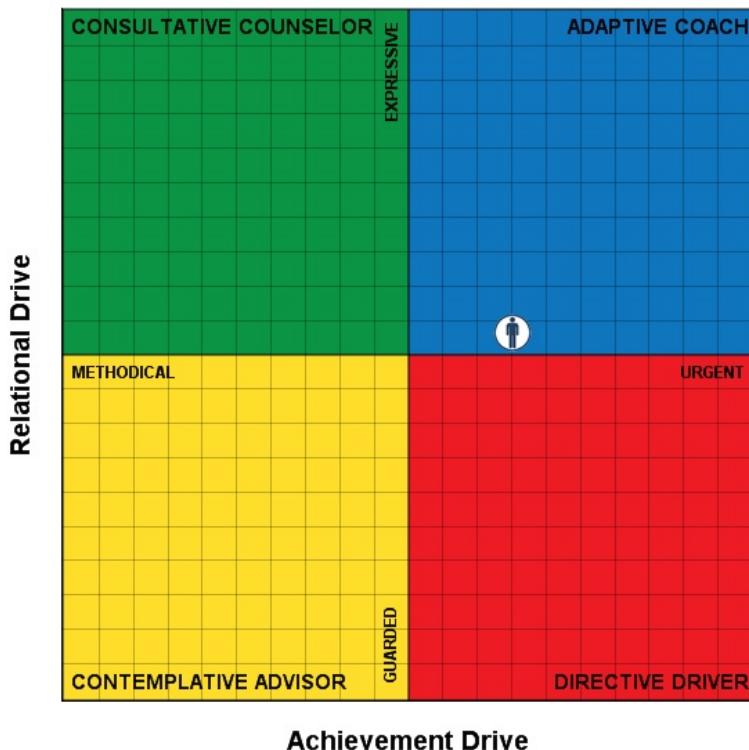
Profile Grid

The LDP results are best summarized as an overall approach to work and relationships, referred to as a profile or style. Each style is based on the plot of two primary factors on a grid:

- *Achievement Drive* (plotted on the x-axis of the Profile Grid)
- *Relational Drive* (plotted on the y-axis of the Profile Grid)

The closer the individual's plot is to any corner of the grid, the more the individual's overall style will be similar to the profile indicated in the respective corner. In contrast, the farther away their plot is from any corner, the less likely their style will reflect the profile indicated. The closer the plot is to the center of the grid, the more the individual's style is moderated, meaning they may tend to exhibit some of the characteristics of all four styles and may tend to be more flexible in their approach. In reality, there will be occasions where the individual may exhibit some characteristics of each profile, depending on the situation. The grid shown here simply portrays the individual's most common approach.

The individual's plot and resulting profile are graphically depicted below:



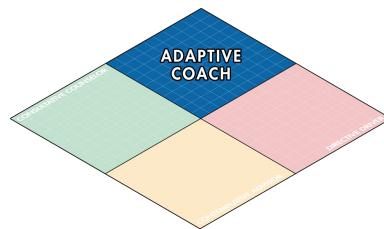
About the Grid

For over 100 years, a 2x2 grid has been used to graphically portray how personality characteristics interact to influence a person's general style or approach. While an individual's response to situations may differ based on a variety of factors, it is generally assumed that one's approach to work and relationships remains fairly consistent over time. The individual's most likely approach is described in graphical and narrative content in this report.



The Coach Profile

The Adaptive Style



Summary Statement

Coaches are most likely to follow an adaptive approach to selling based on a more *URGENT Achievement Drive* and more *EXPRESSIVE Relational Drive*. The more *URGENT Achievement Drive* suggests that Coaches tend to be intense and assertive in pursuing their goals, while the more *EXPRESSIVE Relational Drive* suggests that Coaches tend to be more open and warm in expressing emotions. Coaches focus on collecting and developing relationships in a manner that will advance the sales cycle. Given this focus, the Coach's agility in adapting to different buying styles will be more apparent than a focus on efficiency or formality.

Potential Strengths:

- Quick to build relationships
- Flexible
- Open communication with others

- Focus on task accomplishment
- Interest in collaboration
- Risk tolerance

Potential Challenges:

- Overly confident in gut instinct
- Frustrated by bureaucracy
- Viewed as intrusive

- Motivated by public recognition
- Disinterest in detailed planning
- Aggressive in competitive settings

Approaching Work

The more *URGENT Achievement Drive* suggests that Coaches tend to have a strong focus on accomplishing their objectives and will often pursue the most expedient means to do so. They are self-motivated and driven by the need for success and accomplishment rather than the process and methods to get there. Coaches will become frustrated when policies and procedures interfere with accomplishing objectives, such as closing a sale, and may not hesitate to work around obstacles. They may become bored quickly if not offered an opportunity for enrichment or advancement.

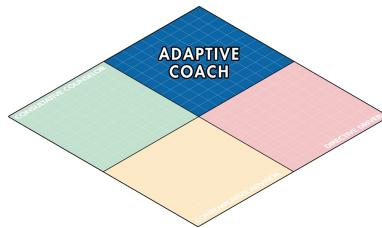
Working with Others

The more *EXPRESSIVE Relational Drive* suggests that Coaches tend to prefer to work in groups. Their *URGENT Achievement Drive* indicates that they often prefer to be in a leadership position rather than just a team member. Their openness allows them to develop relationships quickly and collaborate with team members to accomplish the task at hand. Coaches tend to be more open in expressing emotions, which can occasionally make others uncomfortable.



Sales Cycle

The Coach Profile



PROSPECTING

Prospecting is where the Coach shines. They tend to feel very much at ease with networking and making connections with others. They may not adequately prequalify prospects given their urgency to gain relationships and may spend too much time with unqualified prospects.

BUILDING RAPPORT

Coaches tend to gather quite a following due to their expressive warmth and high drive. Of the four profiles, the coach is most likely to "never meet a stranger", which makes rapport building second nature. They are quick to gain the confidence of their audience and will be comfortable talking to most anyone, at any level within the organization.

DISCOVERING NEEDS

Their ability to break down interpersonal barriers helps them to more easily discover the interests of the prospect. The urgency with which they approach the sales cycle will promote a workable sense of tension. Still, they may struggle at times with talking more than listening.

PRESENTING SOLUTIONS

The Coach will approach the presentation with enthusiasm and warmth. Of the four profiles, the Coach is most likely to be considered charismatic in their presentation style. They are comfortable presenting to a group of any size, and are not likely intimidated by presenting to higher level prospects. They are typically perceptive in interpreting the prospect's non-verbal communication, and may adapt the presentation on the fly. They may exaggerate benefits of the product and may focus on selling the sizzle rather than the steak.

OVERCOMING OBJECTIONS

Given the combination of expressiveness and drive to accomplish results, the Coach can adapt more readily to changing circumstances. As such, they will be more likely to think "quick on their feet" in order to overcome objections. They may tend to rely on rapport rather than facts to overcome objections. They may have a very strong affiliation with their team and thus be overly critical of the competition.

CLOSING THE SALE

The Coach will see the close as the "finish line" and will work intensely to bring the prospect to this point in the process. Despite the urgent focus on achieving closure, the Coach will carefully guide, rather than push, the prospect to a commitment. They may be comfortable discussing price and terms, and may actually enjoy the gamesmanship of the negotiating process.

SERVICING THE CLIENT

The Coach will enjoy touching base with customers after the sale, and will likely be very adept at developing a pipeline of referral business. They may be very successful "selling up" their existing clients.



Prospecting

Prospecting is the process of identifying and qualifying potential customers. It involves finding, screening and maintaining prospective buyers within a sufficient pipeline to support sales goals. Prospecting is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

General

Assertiveness



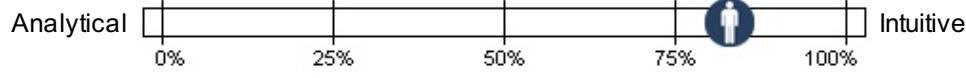
Assertiveness describes a person's level of confidence in approaching activities and asserting opinions. A more confident individual is comfortable cold calling as well as asking customers and centers of influence for referrals.

Work Intensity



Work Intensity describes a person's drive to meet or exceed expectations when approaching goals. A more intense individual will be driven to engage in multiple prospecting activities to maintain and grow a strong pipeline.

Perception



Perception describes how a person relies on intuition and experience in making decisions. A more intuitive individual is comfortable relying on personal experience and gut instinct to identify and prequalify prospects.

Development Points



A more confident individual may appear abrasive and pushy at times. A prospect's body language may indicate that they may be uncomfortable with a forceful approach.



A more intense individual may neglect some of the more mundane tasks of prospecting while looking for the "big deal". Prospecting routines should be established to maintain an active pipeline of qualified prospects.



A more intuitive individual may not take the time necessary to evaluate available information regarding a prospect's viability. Review and analyze all appropriate data on a prospect to ensure they have the capacity to buy.



Building Rapport

Developing Rapport is the process of establishing mutual trust between the salesperson and the customer. In this step, the salesperson gains the buyer's confidence and can transition to the role of trusted advisor. The rapport built at this step has a significant influence on the remaining steps of the sales cycle. Building Rapport is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

General

Openness



Openness describes a person's desire to learn and share information with others. A more private individual will likely approach prospects with a greater degree of formality.

Affiliation

Independent



Affiliation describes a person's interest in collaborating with others to accomplish goals. A more social individual will actively seek opportunities to interact and engage with others.

Self-Protection

Trusting



Self-Protection describes a person's level of trust in the intentions of others. A more skeptical individual will evaluate the capacity of a prospect and quickly recognize issues that may hinder the sales process.

Development Points



A more private individual may be uncomfortable opening dialogue and slow to establish rapport. Role play and practice will develop the conversational skills needed to establish a workable rapport.



A more social individual may have a greater sensitivity to rejection if rapport does not develop in the timeframe expected. A prospect's level of Affiliation should be considered before pressing rapport too hard.



A more skeptical individual may be perceived as critical or judgmental, therefore inhibiting rapport development. Increase awareness of verbal and non-verbal communication to establish and build trust with a prospect.



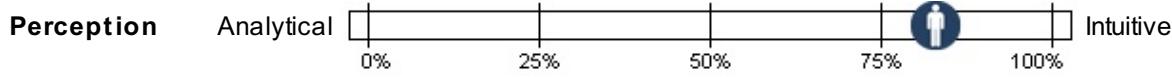
Discovering Needs

Discovering Needs is the process of understanding the customer's desires and concerns in light of the available products or services. Effective questioning, supported by product knowledge, can provide opportunities for the salesperson to present value-added solutions. Discovering Needs is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

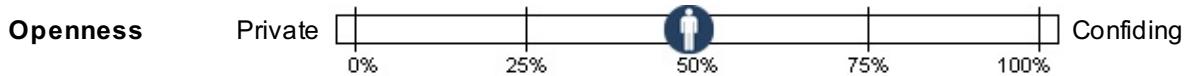
General



Consideration describes a person's tendency to consider others' feelings and emotions. A more distant individual will typically assess a prospect's needs in an objective and less emotional manner.



Perception describes how a person relies on intuition and experience in making decisions. A more intuitive individual is comfortable relying on personal experience and insight to assess a prospect's needs.



Openness describes a person's desire to learn and share information with others. A more private individual will take a formal and direct approach when assessing a prospect's needs.

Development Points



A more distant individual may fail to appreciate the emotional and other intangible factors driving a buyer's needs. Active listening techniques can help develop a sensitivity to a prospect's verbal and nonverbal communication.



A more intuitive individual may jump to conclusions and not dig deep enough to discover all of a buyer's needs. Appropriate time should be devoted to discussing the relevant factors impacting a buyer's situation and subsequent needs.



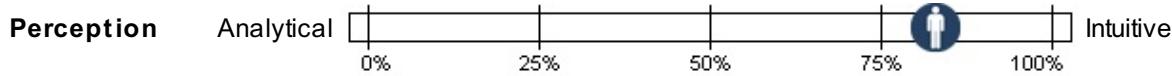
A more private individual may appear detached and self-focused at times, limiting the potential to discover unmet needs. A prospect will typically provide verbal and non-verbal clues that a more casual/familiar approach would be more appropriate.



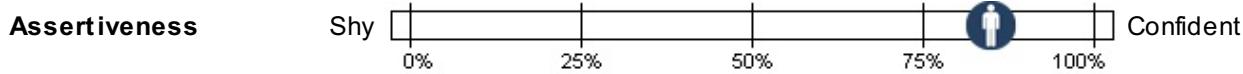
Presenting Solutions

Presenting Solutions is the process of providing the customer with the product or service that satisfies their needs. Communicating the benefits of a product or service is most effective in the context of the buyer's respective situation. Presenting Solutions is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

General



Perception describes how a person relies on intuition and experience in making decisions. A more intuitive individual tends to think on their feet and naturally adjusts the presentation as needed.



Assertiveness describes a person's level of confidence in approaching activities and asserting opinions. A more confident individual will present solutions in a comfortable and self assured manner.



Uncertainty Avoidance describes a person's response to risky or uncertain situations. A more bold individual is comfortable presenting creative solutions to difficult or unusual problems.

Development Points



A more intuitive individual may present solutions based on first impressions and supported by gut-instinct and intuition. Take time to critically evaluate options based on an analysis of the buyer's current situation.



A more confident individual may be quick to present unsupported solutions and defend them aggressively. Possible solutions should be considered in the context of the buyer's needs and current situation.



A more bold individual may be too quick to present an unproven solution without considering the potential risks involved. The nuances of a buyer's current situation should be understood prior to presenting an innovative solution.

Overcoming Objections

Overcoming Objections involves understanding any potential opposition the buyer may offer to the solutions presented, and then adapting the presentation to address each concern. Overcoming Objections is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

General



Adaptability describes a person's approach to new or changing experiences. A more reluctant individual will carefully consider established and proven alternatives before responding to the buyer's objections.



Consideration describes a person's tendency to consider others' feelings and emotions. A more distant individual objectively emphasizes the practicality of presented solutions when responding to objections.



Self-Protection describes a person's level of trust in the intentions of others. A more skeptical individual will seek to clearly understand the true intent of a buyer's objection before responding.

Development Points

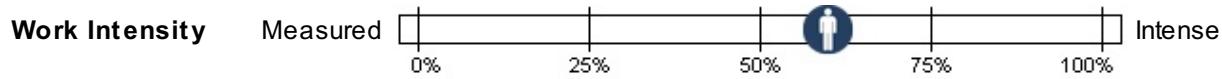
- ⚠ A more reluctant individual may become stressed and resistant if a buyer's objections are unexpected. Develop alternative solutions and ideas in anticipation of various objections with a willingness to explore unrevealed needs.
- ⚠ A more distant individual may discount the buyer's thoughts and opinions when evaluating the merit of their objections. Consider that buyer's objections may arise from feelings and emotions, as opposed to the practicality of the solution.
- ⚠ A more skeptical individual may be perceived as critical or judgmental when responding to a buyer's objections. Develop a greater willingness to trust a buyer's intentions and consider alternate points of view.



Negotiating/Closing the Sale

Having identified the prospect as a qualified buyer with capacity to purchase, been accepted as a trusted advisor, discovered the buyer's needs and presented solutions, this step involves asking for the order. Negotiating/Closing the Sale is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

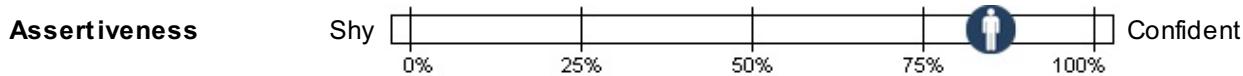
General



Work Intensity describes a person's drive to meet or exceed expectations when approaching goals. A more intense individual may drive the sales cycle with urgency and will build appropriate tension when approaching the close.



Status Motivation describes a person's desire to be publicly recognized for their efforts. A more driven individual has a competitive spirit and enjoys the accolades and recognition that come with closing a sale.



Assertiveness describes a person's level of confidence in approaching activities and asserting opinions. A more confident individual will comfortably move to the closing and ask for the sale.

Development Points

- ⚠ A more intense individual may become too aggressive moving to the close and make the buyer uncomfortable. Slow down and reconnect with the buyer if they appear uncomfortable with the pace of the process.
- ⚠ A more driven individual may not properly utilize the support or assistance from other team members when closing a sale. Recognize the talents of supporting team members and include them when needed to assist in the close.
- ⚠ A more confident individual may exude an assertiveness and brashness that could make the buyer uncomfortable. Knowing when to throttle back a little will allow a buyer to feel in control of their decision.



Servicing the Client

Servicing the Client involves working with the customer to answer questions and resolve concerns that may arise after the purchase. Although the final step of the Sales Cycle, this stage often reveals new opportunities to further grow and cultivate customer relationships. Servicing the Client is impacted by one or more personality dimensions, each offering strengths and developmental opportunities.

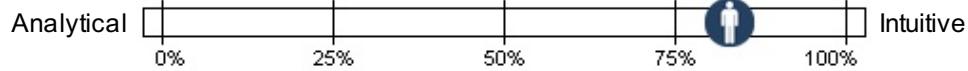
General

Self-Protection



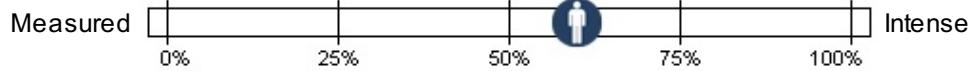
Self-Protection describes a person's level of trust in the intentions of others. A more skeptical individual will seek to clearly understand the root cause of a customer's issues and concerns.

Perception



Perception describes how a person relies on intuition and experience in making decisions. A more intuitive individual will quickly understand the various service issues presented by the client.

Work Intensity



Work Intensity describes a person's drive to meet or exceed expectations when approaching goals. A more intense individual has a drive to accomplish goals and exceed expectations by providing quick resolutions to most issues.

Development Points



A more skeptical individual may appear cynical if customers sense a lack of trust and openness. Consider non-judgmental ways to verify the merits of a customer's issue or service request.



A more intuitive individual may overlook service issues that require precise measurement and detailed analysis. Avoid jumping to early conclusions based on client comments without verifying all relevant information.

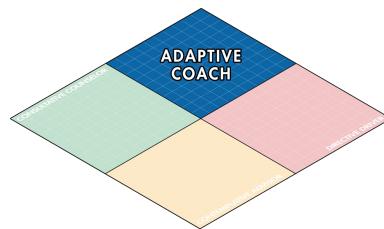


A more intense individual may overlook mundane routines and processes and neglect small follow-up issues. Slow down and be sensitive to the little things that may be very important to the customer.



Development Points

The Coach Profile



Dealing with Rejection

Given the drive to achieve and people-focus exhibited by the Coach, rejection will feel like a failure on two fronts. While difficult to overcome, the Coach will benefit from reviewing what went wrong, while purposely separating their ego from the outcome.

Managing Conflict

Their approach to conflict, including challenging negotiations, may tend to be one of collaboration. They will likely make every effort to work together with the other party to find a win-win solution. They will only reluctantly attempt to force a solution on the other party.

Adjusting the Approach

They may tend to learn from mistakes as they go, and adjust their approach often, even within each step of the process. They will attempt to determine what went wrong based on what they directly observed or heard in their interactions with the prospect.

Motivating Factors

The Coach is motivated to win both relationships and outcomes, in this case, sales. While they are intensely focused on achieving results that will be recognized and rewarded, they are also very interested in rallying others to their cause. As such, they will approach others enthusiastically with an eye toward closing a sale as well as building relationships (which may lead to referrals and additional sales).

Demotivating Factors

Given the Coach's excitement for achieving a "win", they will be demotivated by roles in which their success is not celebrated or recognized. They can grow impatient with mundane tasks or excessive details. They can become disillusioned by a lack of vision from management, or when inconsistent values are articulated by the organization. They will avoid working alone for long periods of time. They will become frustrated by the lack of a clear path for career advancement.

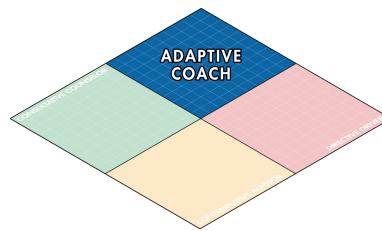
Recognizing Performance

They will likely most appreciate participating in a well-publicized recognition program. They will enjoy pursuing goals that emphasize high sales volume, especially those which encourage competition among their peers. As such, they will be most interested in individual rewards that recognize their intense effort and competitive standing.



Probing Questions

The Coach Profile



- To what extent will the *Coach's* need for “wins” be met within the environment?
- To what extent will the *Coach's* preference for teamwork be met within the organizational culture?
- How might the *Coach's* motivating factors be addressed in the role?
- Which of the *Coach's* demotivating factors may be a concern in the role?
- How might the *Coach's* preferred approach relate to the organization's sales cycle?
- What concerns or limitations may be expected from the *Coach's* selling style?
- What advantages or benefits may be expected from the *Coach's* selling style?
- What percentage of high-performing sales professionals in the organization or team seem to match the *Coach's* style?
- To what extent might the *Coach's* rapport-building approach be a fit for the average prospect they may face?
- How might the discovery process be more or less effective, given the *Coach's* style in assessing the need?
- To what extent would the *Coach's* likely presentation style meet the needs of most prospects they might encounter?
- How might the *Coach's* response to objections impact their likelihood to close sales within the process?
- How might the *Coach's* style impact their closing success?
- To what extent might the *Coach's* likely approach to customer care support or hinder their success?



Contact Information

For more information regarding the Sales Profile Report (SPR) or other products and services available to help you develop and coach high performers, please contact your LDC Affiliate:



Important Note

This report does not represent a comprehensive measure of psychological traits, nor does it claim to represent a prediction of behavior. No part of this report is intended to convey a psychological, medical, or psychiatric evaluation. This report is intended to provide personal insight that is useful in coaching, teambuilding, and other aspects of professional development. No employment decision should be made based, in whole or in part, on the results contained herein.