



TTI Talent Insights™

Coaching Report - Sales Version

*"He who knows others is learned.
He who knows himself is wise."
—Lao Tse*

Julie Smith

11-10-2004



INTRODUCTION

Where Talent Meets Opportunity™

The Talent Insights™ Coaching Report was designed to increase the understanding of an individual's talents. The report provides insight to two distinct areas: behaviors and motivators. Understanding strengths and weaknesses in both of these areas will lead to personal and professional development and a higher level of satisfaction.

The following is an in-depth look at your personal talents in the two main sections:

SECTION 1: BEHAVIORS

This section of the report is designed to help you attain a greater knowledge of yourself as well as others. The ability to interact effectively with people may be the difference between success and failure in your work and personal life. Effective interaction starts with an accurate perception of oneself.

SECTION 2: MOTIVATORS

This section of the report provides information on the why of your actions, which with application and coaching, can tremendously impact your valuing of life. Once you know the motivations that drive your actions, you will immediately be able to understand the causes of conflict.



INTRODUCTION

Behaviors

Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."
—W.M. Marston*



SALES CHARACTERISTICS

Based on Julie's responses, the report has selected general statements to provide a broad understanding of her sales style. This section highlights how she deals with preparation, presentation, handling objections, closing, and servicing. The statements identify the natural sales style she brings to the job. Eliminate or modify any statement that is not true based on sales training or experience.

Julie may reluctantly make cold calls. She prefers to sell in a predictable environment, and cold calls are hard to prepare for or predict the outcome. When Julie sees something that is wrong, she wants to fix it. She is oriented toward achieving practical sales results. Sometimes Julie gathers so much data for her presentation it becomes difficult for her to decide what she should use. She is a traditionalist who may resist selling new products or services until they are proven to her standards. Julie wants to make sure her facts are correct, and that she presents as much detailed information as possible for her client or customer. She believes that "going by the book" and following all the company rules and procedures will demonstrate the correct way for her to sell. She usually becomes frustrated if the company doesn't provide some policies to guide her sales effort. Taking time to learn all the product information is important to her. In fact, she can be reluctant to make calls until she has more than adequate product knowledge.

Julie may lean on management for assistance with her sales presentation. She wants to do it properly the first time, possibly requiring assistance from her manager. At times she will be overly prepared. She wants the facts and figures at her fingertips. Some people may think she uses too many or unnecessary sales aids. The aggressive-style buyer may force her to yield to the buyer's way of thinking. She may be reluctant to argue



SALES CHARACTERISTICS

about it, preferring to avoid confrontation or conflict. She will not exaggerate in her sales presentation. You can be confident she will support any statements she makes. Julie commonly brings up all the known objections so the buyers will have all the data to make their decision. She believes buyers prefer this approach to support their decisions. She approaches a sales presentation in a disciplined manner; that is, she will make thorough preparation and be punctual for her appointment.

Julie can be seen as thinker whose intuitive talents can bring divergent solutions to the forefront. She likes to know what is expected of her in a servicing relationship and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues. Being precise, patient, methodical and exact can best describe Julie's approach to servicing. She feels that "closing" the sale should be automatic because of all the facts, data and information she has presented. Julie may be reluctant to seek the order, usually caused by fear of failure. If she doesn't ask for the order, she hasn't failed. She takes pride in her competence or her ability to understand all the facts of a situation. She is good at concentrating on data while looking for the best method of solving the customer's problem.



VALUE TO THE ORGANIZATION

This section of the report identifies the specific talents and behavior Julie brings to the job. By looking at these statements, one can identify her role in the organization. The organization can then develop a system to capitalize on her particular value and make her an integral part of the team.

- Defines, clarifies, gets information, criticizes and tests.
- Excellent troubleshooter.
- Always looking for logical solutions.
- Comprehensive worker.
- Suspicious of people with shallow ideas.
- Maintains standards.
- Objective and realistic.
- Can make decisions without getting emotionally involved.
- Accurate and intuitive.



CHECKLIST FOR COMMUNICATING

Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with Julie. Read each statement and identify the 3 or 4 statements which are most important to her. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Julie most frequently.

Do:

- Prepare your "case" in advance.
- Give pros and cons on ideas.
- Provide details in writing.
- Keep at least three feet away from her.
- Give her time to verify reliability of your actions; be accurate, realistic.
- Draw up a scheduled approach to implementing action with a step-by-step timetable; assure her that there won't be surprises.
- Follow through, if you agree.
- Give her time to analyze the data before making a decision.
- Provide solid, tangible, practical evidence.
- Use a tone of voice that shows sincerity.
- Have the facts in logical order.
- Use expert testimonials.



DON'TS ON COMMUNICATING

This section of the report is a list of things NOT to do while communicating with Julie. Review each statement with Julie and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.

Don't:

- Overuse gestures.
- Pretend to be an expert if you are not.
- Dillydally.
- Use inappropriate buzz words.
- Leave things to chance or luck.
- Threaten, cajole, wheedle, coax or whimper.
- Rush the decision-making process.
- Say "trust me"--provide her with the answers to her questions.
- Make statements you cannot prove.
- Use high speed, intense inputs.
- Be disorganized or messy.



SELLING TIPS

This section provides suggestions on methods which will improve Julie's communications when selling to different styles. The tips include a brief description of typical people in which she may interact. By adapting to the communication style desired by other people, Julie will become more effective in her communications with them. She may have to practice some flexibility in varying her communication style with others who may be different from herself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.

When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "presentation" in advance.
- Stick to business--provide fact to support your presentation.
- Be accurate and realistic--don't exaggerate.

Factors that will create tension:

- Being giddy, casual, informal, loud.
- Wasting time with small talk.
- Being disorganized or messy.

When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:

- Be clear, specific, brief and to the point.
- Stick to business. Give an effective presentation.
- Come prepared with support material in a well-organized "package."

Factors that will create tension:

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present yourself softly, nonthreateningly and logically.
- Earn their trust--provide proven products.

Factors that will create tension:

- Rushing headlong into the interview.
- Being domineering or demanding.
- Forcing them to respond quickly to your questions.

When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Don't deal with a lot of details, unless they want them.
- Provide testimonials from people they see as important.

Factors that will create tension:

- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.



IDEAL ENVIRONMENT

This section identifies the ideal work environment based on Julie's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that Julie enjoys and also those that create frustration.

- Prefers technical work, specialized area.
- An environment where she can use her intuitive thinking skills.
- Assignments that can be followed through to completion.
- Environment where she can be a part of the team, but removed from office politics.
- Data to analyze.
- Limited contact with people.
- Sales records that show tangible evidence of her results.
- Private office or work area.
- Familiar work environment with a predictable pattern.



PERCEPTIONS

A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on Julie's self-perception and how, under certain conditions, others may perceive her behavior. Understanding this section will empower Julie to project the image that will allow her to control the situation.

"See Yourself As Others See You"

SELF-PERCEPTION

Julie usually sees herself as being:

Precise
Moderate
Knowledgeable

Thorough
Diplomatic
Analytical

OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see her as being:

Pessimistic
Worrisome

Picky
Fussy

And, under extreme pressure, stress or fatigue, others may see her as being:

Perfectionistic
Strict

Hard-to-Please
Defensive



DESCRIPTORS

Based on Julie's responses, the report has marked those words that describe her personal behavior. They describe how she solves problems and meets challenges, influences people, responds to the pace of the environment and how she responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring Magnetic Political Enthusiastic Demonstrative Persuasive Warm Convincing Polished Poised Optimistic Trusting Sociable	Phlegmatic Relaxed Resistant to Change Nondemonstrative Passive Patient Possessive Predictable Consistent Deliberate Steady Stable	Evasive Worrisome Careful Dependent Cautious Conventional Exacting Neat Systematic Diplomatic Accurate Tactful Open-Minded Balanced Judgment
Conservative Calculating Cooperative Hesitant Low-Keyed Unsure Undemanding Cautious Mild Agreeable Modest Peaceful Unobtrusive	Reflective Factual Calculating Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	Firm Independent Self-Willed Stubborn Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details



NATURAL AND ADAPTED SELLING STYLE

Julie's natural selling style of dealing with problems, people, pace and procedures may not always fit the sales environment. This section is extremely important as it will identify if a salesperson's natural style or adapted style is correct for the current sales environment.

Natural	PROBLEMS - CHALLENGES	Adapted
Julie is ambitious in her approach to selling, displaying a strong will and has a need to win against all obstacles. She has a tendency to confront prospects and desire to control the sales situation. She needs a territory and products that will constantly challenge her.		Julie sees no need to change her sales approach from her basic style as it is related to solving problems and challenges.

Natural	PEOPLE - CONTACTS	Adapted
Julie feels that the convincing of people can only be done within the framework of logical facts presented by totally objective people or machines. She rarely displays emotion when attempting to influence others.		Julie will use an undemonstrative approach to influencing others. She prefers to let the facts and figures stand for themselves. Rarely will she embellish the facts. Her trust level is calculated on each interaction.



NATURAL AND ADAPTED SELLING STYLE

Natural	PACE - CONSISTENCY	Adapted
Julie's natural style prefers a sales environment that can take advantage of her relaxed demeanor, and patience is looked at as a requirement to win. She enjoys follow-up and follow-through. She resists selling new products until proven to her standards.		Julie sees the need to deal with a wide scope of sales activities and prospects. She feels comfortable shuffling schedules and filling every available time slot with activities.

Natural	PROCEDURES - CONSTRAINTS	Adapted
Julie feels comfortable following sales procedures and being totally prepared for her sales presentation. Her structured approach will eliminate the error of omission and allow her to present her facts in a consistent manner.		The difference between Julie's basic and adapted sales style is not significant and she sees no need to change on this factor.



ADAPTED STYLE

Julie sees her present work environment requiring her to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why she is adapting this behavior.

- Having all the facts available before making a call.
- Being alert to mistakes that may jeopardize a sale.
- Authority to carry out responsibility.
- Never leaving the office unprepared.
- Using authority and responsibility for completing the sale.
- Avoiding an emotional involvement with the product or service she represents.
- Telling clients or customers about the "big picture."
- Positive response to a client's objections.
- Presenting her product or service in a calm, detached manner.
- A resourceful, eager self-starter.
- Depending on a proven method to sell her service or product.
- Exhibiting confidence in approaching customers.
- Attentive to the details that are involved with selling.



KEYS TO MOTIVATING

This section of the report was produced by analyzing Julie's wants. People are motivated by the things they want; thus, wants that are satisfied no longer motivate. Review each statement produced in this section with Julie and highlight those that are present "wants."

Julie wants:

- Referrals.
- Awards and rewards.
- Reassurance she is doing the job right.
- Time to adjust to changes in the job or territory.
- Control of her own destiny.
- Support staff to do detail work.
- Operating procedures in writing.
- Power and authority to take the risks to achieve sales results.
- Advancement when she is ready.
- To be part of a quality-oriented sales team.
- Evaluation based on bottom line.



KEYS TO MANAGING

In this section are some needs which must be met in order for Julie to perform at an optimum level. Some needs can be met by herself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with Julie and identify 3 or 4 statements that are most important to her. This allows Julie to participate in forming her own personal management plan.

Julie needs:

- Tangible things to sell.
- An exact job description and expectations in writing.
- Explanations for sales objections.
- An objective boss who values her quiet demeanor.
- Time to think and plan before making a sales call.
- To soften the edge and not be so blunt.
- Time to warm up to people.
- Sincere feedback from others on how to improve her sales.
- Support when under pressure to perform many activities quickly.
- Skills to come across warm and close to customers, when appropriate.
- More confidence in her ability to sell new products.



AREAS FOR IMPROVEMENT

In this area is a listing of possible limitations without regard to a specific job. Review with Julie and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering her performance and develop an action plan to eliminate or reduce this hindrance.

Julie has a tendency to:

- Rarely change her style to meet buyer's style.
- Spend too much time servicing and not enough time selling new accounts.
- Have an inherent fear of closing.
- Take rejection personally, and may not close to avoid the pain.
- Get bogged down in details and use details to protect her position.
- Be self-depreciating (puts self down)--doesn't project self-confidence.
- Bring up objections so the buyer will have all the data to base the decision on.
- Often fail to close the sale when the buyer is ready to buy.



ACTION PLAN

The following are examples of areas in which Julie may want to improve. Circle 1 to 3 areas and develop action plan(s) to bring about the desired results. Look over the report for possible areas that need improvement.

- | | |
|--|--|
| <input type="checkbox"/> Customer Service | <input type="checkbox"/> Closing |
| <input type="checkbox"/> Prospecting | <input type="checkbox"/> Product Knowledge |
| <input type="checkbox"/> Preparation | <input type="checkbox"/> Personal Goals |
| <input type="checkbox"/> Presentation | <input type="checkbox"/> Other |
| <input type="checkbox"/> Handling Objections | |

Area: _____

- 1.
- 2.
- 3.

Area: _____

- 1.
- 2.
- 3.

Area: _____

- 1.
- 2.
- 3.

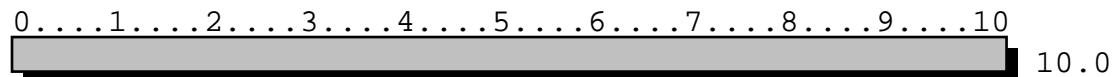
Date to Begin: _____ Date to Review: _____



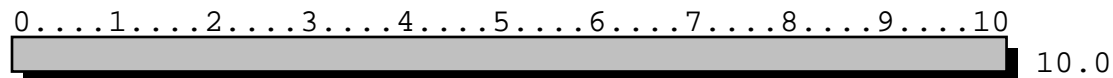
BEHAVIORAL HIERARCHY

The Behavioral Hierarchy graph will display a ranking of your natural behavioral style within a total of eight (8) areas commonly encountered in the workplace. It will help you understand in which of these areas you will naturally be most effective.

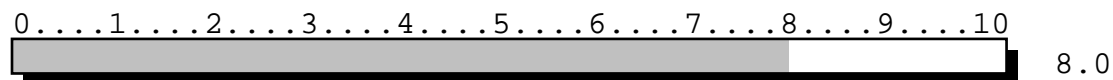
1. ORGANIZED WORKPLACE



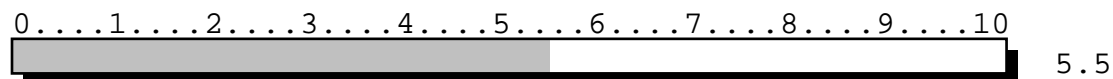
2. ANALYSIS OF DATA



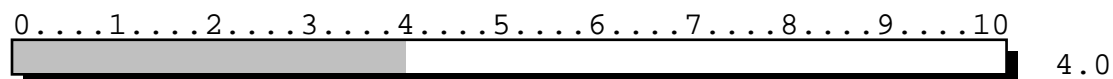
3. COMPETITIVENESS



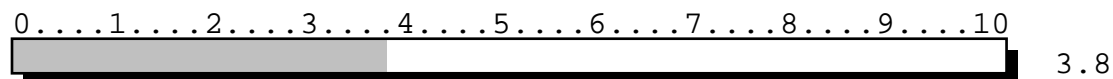
4. URGENCY



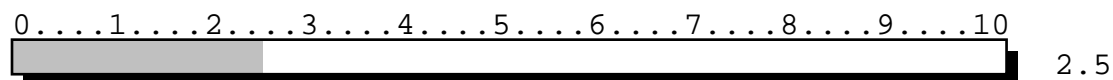
5. CUSTOMER ORIENTED



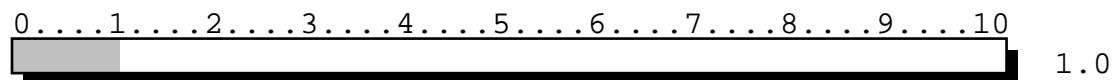
6. FREQUENT CHANGE



7. VERSATILITY



8. FREQUENT INTERACTION WITH OTHERS

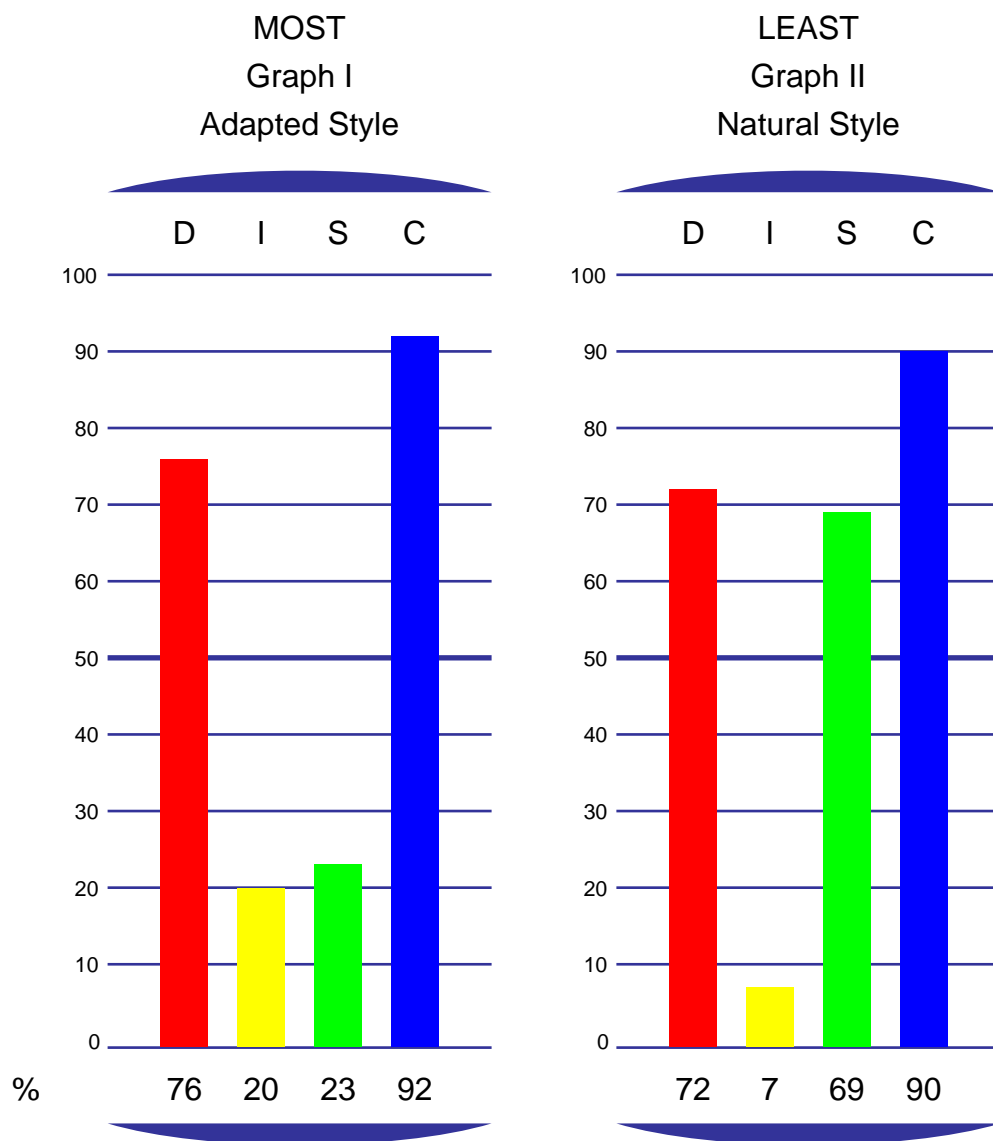




STYLE INSIGHTS™ GRAPHS

Julie Smith

11-10-2004



Norm 2003



THE SUCCESS INSIGHTS® WHEEL

The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

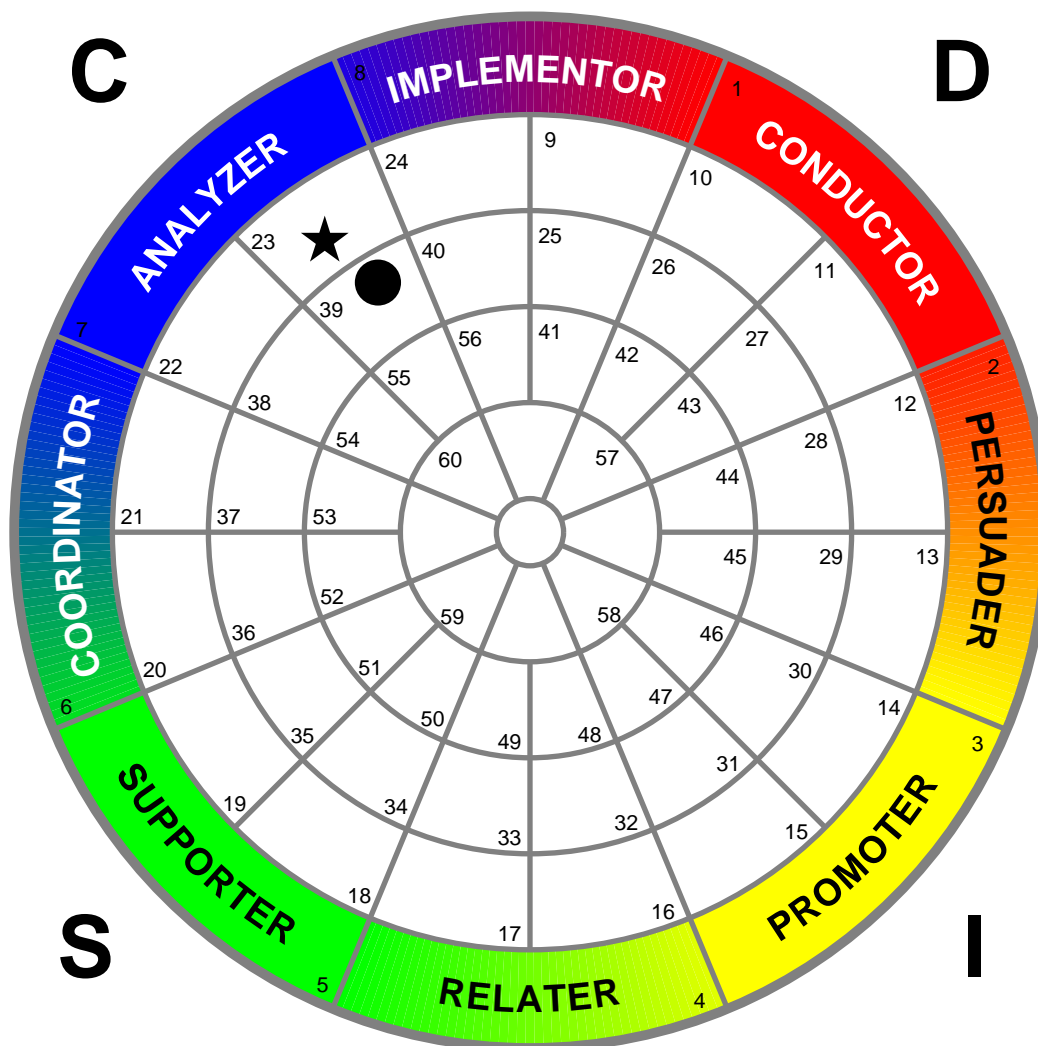
If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.



THE SUCCESS INSIGHTS® WHEEL

Julie Smith

11-10-2004



Adapted: ★ (23) IMPLEMENTING ANALYZER

Natural: ● (39) IMPLEMENTING ANALYZER (FLEXIBLE)

Norm 2003



INTRODUCTION

Motivators

Knowledge of an individual's values help to tell us WHY they do things. A review of an individual's experiences, references, education and training help to tell us WHAT they can do. Behavioral assessments help to tell us HOW a person behaves and performs in the work environment. The Workplace Motivators report measures the relative prominence of six basic interests or values (a way of valuing life): Theoretical, Utilitarian/Economic, Aesthetic, Social/Altruistic, Individualistic/Political and Traditional/Regulatory.

Value	the Drive for
Theoretical	Knowledge
Utilitarian/Economic	Money
Aesthetic	Form and Harmony
Social/Altruistic	Helpfulness
Individualistic/Political	Power
Traditional/Regulatory	Order

Values help to initiate one's behavior and are sometimes called the hidden motivators because they are not always readily observed. It is the purpose of this report to help illuminate and amplify some of those motivating factors and to build on the strengths that each person brings to the work environment.

Based on your choices, this report ranks your relative passion for each of the six values. A knowledge of an individual's values help to tell us why they do what they do. By measuring values, we uncover some of these motivators and can identify strengths that make each person unique within an organization. Values initiate or drive our behavioral style.

Workplace Motivators Report

This document has been prepared based on careful statistical analysis of the response pattern on the Motivation Insights™ instrument. Norms have been developed for this instrument from thousands of professionals. This report uses the latest information available about human cognition and memory. Content is arranged in easy-to-remember categories using an interactive page layout.



INTRODUCTION

Motivators

How to get the most from this report

1. Add, delete, and write comments in this document and consider it a work-in-progress handbook or personal tool. Consult, review, revise, and update this document periodically.
2. Review the report and select items of primary importance to current projects. Determine the best steps ahead based on what the report reveals and current experiences.
3. As appropriate, share the information on the Team Building Summary with peers and managers at whatever level of disclosure feels comfortable. As communication is a two-way process, peers and managers are encouraged to share similar information from their own Team Building Summary sheets.
4. Use the information in the report to serve as a "self-management handbook" or "empowerment manual" to help clarify workplace values issues, and to assist in maintaining optimal performance.
5. Other steps and processes may emerge through team meetings.

This report includes

- A section for each of the six Values dimensions in these categories: General Characteristics; Value to the Organization; Keys to Managing and Motivating; Training, Professional Development and Learning Insights; Continuous Quality Improvement.
- A Norms and Comparisons section that reveals where your values are compared to the national mean.
- A Values Graph
- A Values Wheel
- A Values Action Plan for affirming strengths and encouraging growth and development.
- A Team Building Summary to facilitate sharing selected information with others.



UTILITARIAN/ECONOMIC

The Utilitarian/Economic score shows a characteristic interest in money and what is useful. This means that an individual wants to have the security that money brings not only for themselves, but for their present and future family. This value includes the practical affairs of the business world - the production, marketing and consumption of goods, the use of credit, and the accumulation of tangible wealth. This type of individual is thoroughly practical and conforms well to the stereotype of the average American business person. A person with a high score is likely to have a high need to surpass others in wealth.

General Characteristics

- Interested in what is practical and useful in achieving her vision of success.
- Goal driven, especially financial goals.
- Interested in what is practical and useful in meeting goals (usually economic ones).
- Knowledge for the sake of knowledge may be viewed as a waste of time, talent, energy and creativity.
- When profit or project cost/benefits are examined, Julie may take the position that the ends justify the means.
- May want to surpass others in wealth or materials.
- Julie tends to like rewards based on the results achieved rather than on the method used to obtain the results.
- Sales, technical, or management training programs must demonstrate a bottom-line financial gain as a result of their participation.
- Needs for education and training to be practical and useful, with a profit or economic motive.

Value to the Organization

- Will protect organizational or team finances, as well as her own.
- Makes decisions with practicality and bottom-line dollars in mind.
- Pays attention to R.O.I. (return on investment) in business or team activity.
- Highly productive.
- Shows a keen awareness of the revenue-clock, her own and the organization's.



UTILITARIAN/ECONOMIC

Keys to Managing and Motivating

- Realize that it's not just money that motivates, but also personal payback from the job.
- Be aware that for those who score in this very high range there is a potential for low company loyalty. Be certain to reward performance, and encourage participation as an important member of the team.
- Provide coaching to help Julie appreciate that not everybody is highly-motivated by wealth, return-on-investment and gain like she is.
- Provide recognition and rewards (e.g. bonuses) as soon as possible, not just at the end of the quarter or year.
- Be certain Julie is balancing her professional and personal life.

Training, Professional Development and Learning Insights

- If possible, build in some group competition as a part of the training activities.
- Link learning outcomes to the ability to become more effective in increasing earnings for both herself and the organization.
- Provide rewards and incentives for participation in additional training and professional development.

Continuous Quality Improvements

- Within this very high economic drive, there is a significant motivating factor in achieving goals. It may also become an insatiable need, especially in sales people and others sharing this very high economic drive.
- Needs to hide the dollar signs in her eyes in order to establish the most appropriate rapport with others.
- Needs to have an increased sensitivity to the needs of others, and less demonstration of potential selfishness.



AESTHETIC

A higher Aesthetic score indicates a relative interest in "form and harmony." Each experience is judged from the standpoint of grace, symmetry or fitness. Life may be regarded as a procession of events, and each is enjoyed for its own sake. A high score here does not necessarily mean that the incumbent has talents in creative artistry. It indicates a primary interest in the artistic episodes of life.

General Characteristics

- Has a desire for harmony and artistry in her work and personal environment.
- Has a drive to be expressive in artistic or inventive ways.
- Has an appreciation for nature or beauty in the environment that may be demonstrated in the things she does.
- Julie likes rewards based on the results she achieves rather than on the method used to obtain the results.
- Occasionally prefers some solitary time for personal reflection and rebalancing.
- Seeks personal fulfillment and self-realization in both work and personal settings.
- Cares about the feelings of others on the team, and is supportive of their creative ideas.
- Form and harmony provide her with memorable experiences.

Value to the Organization

- Demonstrates a high regard for the feelings and emotions of others on the team.
- Julie looks for and appreciates the beauty in things and shares that with others.
- Julie will evaluate things based on both artistic beauty and usefulness.
- Likes to bring people of common interest together.
- Has a good sense of creative problem-solving and defuses tense situations with a humorous quip or comment.
- Julie shows interest in the totality of a situation and the ideal harmony of environmental balance.



AESTHETIC

Keys to Managing and Motivating

- Provide an environment in which there is opportunity to express a creative side, as well as a practical side.
- Remember also that Julie may overreact in emotional situations.
- Allow Julie to share her creative nature as she chooses to offer.
- Julie gets a high degree of motivation from seeing the totality, balance and harmony in situations, both with internal team members and with external customers and clients. Provide an outlet for this strength.
- Remember that Julie brings a high creativity factor to the things she does. Amplify this strength.

Training, Professional Development and Learning Insights

- Learning and professional development should be linked to the potential of being more effective in developing creative solutions to problems.
- Courses and training should help amplify the need to understand the expanse of her imagination and inventiveness.
- Learning successes can be linked to increasing her personal understanding of form, harmony and the big picture.

Continuous Quality Improvements

- May get into creative mode too much, with little feeling for the practical side of organizational situations and efforts.
- May get into creative or performance mode a bit too often.
- At times tries to be too much of a non-conformist.



TRADITIONAL/REGULATORY

The highest interest for this value may be called "unity," "order," or "tradition." Individuals with high scores in this value seek a system for living. This system can be found in such things as religion, conservatism or any authority that has defined rules, regulations and principles for living.

General Characteristics

- Can support and understand the position of both higher and lower Traditional/Regulatory types.
- Believes in the importance of group or team efforts, but also feels that individual rights should be honored.
- Accepts authority, but also feels that personal opinions should be honored in making decisions.
- May challenge the rules within safe boundaries to express individual ideas.
- May be able to serve as a bridge between those on the team with higher Regulatory drives and those with lower Regulatory drives.
- Typically won't get bogged down in minutia, nor will she ignore details when decision-making.
- This value needs to be compared against other higher- and lower-scoring values to determine her driving factors.

Value to the Organization

- Brings flexibility to the team. Follows precedent when necessary and able to set new precedent when necessary.
- Julie is able to walk the line between following the rules and bending the rules, and knowing the difference.
- A stabilizing force on the team.
- Able to appreciate the needs of both the higher and lower Traditional/Regulatory individuals on the team.
- Shows respect for protocol and standard operating procedure without becoming overly rigid.
- May be perceived by others on the team as neither rigid nor undisciplined, but rather as one who is responsible and mature in approach to corporate and organizational protocol.



TRADITIONAL/REGULATORY

Keys to Managing and Motivating

- Remember that Julie has the flexibility to follow procedures when necessary, and to set new procedures when necessary.
- Support the strength that Julie brings to the team in being a stabilizing force between those who want to follow protocol and those who want to challenge the protocol.
- Remember that Julie has the ability to be a balancing and stabilizing agent on operations, procedures, and protocol issues, without being an extremist toward either side.
- Julie brings a procedure-drive typical of many business professionals.
- Include her perspective in order to gain a middle-ground understanding of issues.

Training, Professional Development and Learning Insights

- May show flexibility in preference of professional development activities to include both individual structured activities, as well as activities of a more creative and unstructured design.
- Tends to be participatory in learning and professional development situations without trying to re-write the curriculum.
- Is able to engage in professional development activities as a supportive member of the team.

Continuous Quality Improvements

- May need to state opinions or take a visible position on some procedural or protocol issues.
- May need to take a firmer stand or position on some team issues.
- May need to examine other Values drives to determine the importance of this Traditional/Regulatory drive factor.



THEORETICAL

The primary drivers with this value are the discovery of KNOWLEDGE and appetite for LEARNING. In pursuit of this value, an individual takes a "cognitive" attitude. Such an individual is nonjudgmental regarding the beauty or utility of objects and seeks only to observe and to reason. Since the interests of the theoretical person are empirical, critical and rational, the person appears to be an intellectual. The chief aim in life is to order and systematize knowledge: knowledge for the sake of knowledge.

General Characteristics

- Her Theoretical need is not the most important or primary driving values factor.
- Julie may provide a balance between the very high theoretical approaches, and the very low approaches, and be able to communicate with each side.
- Is able to understand the needs of big picture issues, and appreciate the needs of trivial or minute issues without being an extremist.
- Brings a sense of balance and stability to a variety of technical issues impacting the team.
- Julie typically won't get bogged down in minutia, nor will she ignore the details when decision-making.

Value to the Organization

- Julie demonstrates awareness of the necessary technical features, and responds as needed on-the-job.
- Brings flexibility to the team; that is, being detail-oriented when necessary, and being practically-oriented other times.
- Is a stabilizing force on the team.
- Is able to appreciate the needs of both the higher and lower Theoreticals.
- Shows curiosity about technical details without getting bogged down.

Keys to Managing and Motivating

- Remember that she has the ability to be a balancing and stabilizing agent on high knowledge-driven tasks/assignments/projects.
- Julie brings a knowledge-drive typical of many business professionals.
- Include the perspective she brings in order to gain a middle-ground understanding.
- Check for other values drives that may be higher or lower than this one in order to gain a more complete picture of specific keys to managing and motivating.



THEORETICAL

Training, Professional Development & Learning Insights

- Is rather flexible and accepting of most training programs offered in the organization.
- Is able to see the need for training, and also realizes the importance of practical information.
- Please check other areas of higher or lower values drive for additional insight into professional development needs.

Continuous Quality Improvements

- May need to be a bit more demonstrative on some complex theoretical issues.
- May be asked to take a firmer stand or position on team initiatives.
- May need to examine other values drives to determine the importance of this Theoretical drive factor.



INDIVIDUALISTIC/POLITICAL

The primary interest for this value is POWER. Research studies indicate that leaders in most fields have a high power value. Since competition and struggle play a large part in all areas of life, many philosophers have seen power as the most universal and most fundamental of motives. There are, however, certain personalities in whom the desire for direct expression of this motive is uppermost; who wish, above all, for personal power, influence and renown.

General Characteristics

- Likes helping people on the team.
- Assists others in problem solving and trouble-shooting.
- Doesn't need to be the "star" of a project.
- Doesn't seek individual recognition above the group or team.
- Prefers to be more of a team player than a team leader.
- May not seek or choose a leadership role for herself, but may be satisfied in being an active and supportive member of a team of professionals.
- May spend great effort on a project without requiring public credit or recognition for her work.
- May prefer a team member position on various projects.
- May not require lots of "air-time" at meetings, and may need to be encouraged to provide ideas verbally.

Value to the Organization

- A stabilizing influence on the team.
- Ability to support team efforts without requiring a lot of recognition.
- Able to offer her own creative ideas in a manner that is respectful of team roles.
- May be seen by others as a stabilizing influence especially when the heated differences of extreme positions emerge when the team is under pressure.
- Is able to maintain work ethic even under pressure so the project is met successfully and interpersonal stressors have been minimized.
- May be considered the unsung hero of a successful project or initiative.

Keys to Managing and Motivating

- Provide a supportive environment where her talents may be encouraged and appreciated.
- Allow for choices as to extent and visibility of team membership or leadership that she might desire.
- Provide support for complete follow-through on project tasks.
- Don't force leadership roles or increased authority unless mutually agreed upon.
- Remember behind-the-scenes efforts and contributions, and recognize those with sincere appreciation.



INDIVIDUALISTIC/POLITICAL

Training, Professional Development and Learning Insights

- Enjoys more team-oriented professional development activities.
- Julie prefers more traditional types of learning, courses, and professional development.
- Tends to show a high degree of self-discipline in training courses.

Continuous Quality Improvements

- Julie may not be heard the first time by the team. She may need to speak up a second or third time if necessary in order to be acknowledged.
- When presenting an idea to the team, she should remember that members may need a message with some attention-getting ingredients.
- As opinion is formed after careful consideration, she may need to be more willing to share that opinion with others.



SOCIAL/ALTRUISTIC

Those who score very high in this value have an inherent love of people. The Social/Altruistic person prizes other people and is, therefore, kind, sympathetic and unselfish. They are likely to find the Theoretical, Utilitarian and Aesthetic values cold and inhuman. Compared to the Individualistic value, the Social/Altruistic person regards helping others as the only suitable form for human relationships. Research into this value indicates that in its purest form, the Social/Altruistic interest is selfless.

General Characteristics

- Shows a bottom-line practicality regarding helping others and sharing time and resources: there must be a set of mutual wins.
- Places a business "guard" on her trust level, perhaps as a result of being burned in the past and attempting not to let it happen again.
- May keep an ear to the revenue-clock of an organization, and maintain a business sense in people transactions.
- Has a tendency to have a strong work ethic that is projected to others. "I've worked hard and have been persistent, and others should be able to do that for themselves."
- Has learned to say "No" when asked to do things that may not contribute to the bottom line (either her own or the organization's).
- Tends to be more "self-concerned" than "other-concerned" in terms of meeting needs and sharing time, talent and energy.
- May look at those scoring higher as selfless types who are giving their security away.
- May be generous to charities outside of the job, but may balk at displaying that same generosity in the workplace.
- Motivated and driven in Values areas other than the Social/Altruistic.

Value to the Organization

- Bottom-line practicality regarding business and transactions.
- Survivor in the business arena, even in the midst of heavy competition.
- Not easily swayed in terms of emotional issues.
- Good business sense.



SOCIAL/ALTRUISTIC

Keys to Managing and Motivating

- Be careful not to overload assignments with too many coaching or counseling activities since she may not perceive an immediate business gain from those activities.
- Appeal to the practical side that Julie shows.
- Julie scores like those who set their own goals. Use those goals as primary motivators.
- Don't get lofty and theoretical with lots of rhetoric.
- Have your idea or approach make "business sense."

Training, Professional Development and Learning Insights

- Link learning and professional development to other items of greater self-interest.
- Find areas of the training that relate to increased business opportunity or advancement.
- Connect learning and training goals to bottom-line increases and successes.

Continuous Quality Improvements

- Some perceive a "selfishness-factor" on certain projects or when sharing information resources with the team.
- Seen as overly "guarded" by some, especially those who tend to be more open and sharing in a business sense.
- Needs to be more open and receptive to others.






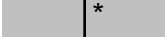


MOTIVATORS - NORMS & COMPARISONS

For years you have heard statements like, "Different strokes for different folks," "to each his own," and "people do things for their own reasons, not yours." When you are surrounded by people who share similar values, you will fit in with the group and be energized. However, when surrounded by people whose values are significantly different from yours, you may be perceived as out of the mainstream. If the differences are understood, each brings strengths to the equation. If not understood, these differences can induce stress or conflict. When confronted with this type of situation you can:

- Change the situation.
- Change your perception of the situation.
- Leave the situation.
- Cope with the situation.

This section reveals areas where your values may be outside the mainstream and could lead to conflict. The further away you are from the mainstream on the high side, the more people will notice your passion about that value. The further away from the mainstream on the low side, the more people will view you as indifferent and possibly negative about that value. The shaded area for each value represents 68 percent of the population or scores that fall within one standard deviation above or below the national mean.

NORMS & COMPARISONS TABLE - Norm 2003		
Julie Smith		
THEORETICAL		Mainstream
UTILITARIAN		Passionate
AESTHETIC		Mainstream
SOCIAL		Indifferent
INDIVIDUALISTIC		Mainstream
TRADITIONAL		Mainstream

 - 68 percent of the population | - national mean * - your score

Mainstream - one standard deviation of the national mean

Passionate - two standard deviations above the national mean

Indifferent - two standard deviations below the national mean

Extreme - three standard deviations from the national mean



MOTIVATORS - NORMS & COMPARISONS

Areas in which you have strong feelings or passions compared to others:

- You strive for efficiency and practicality in all areas of your life, seeking to gain a return on your investment of time, talent and resources. Others may feel you always have a string attached and are always trying to gain a personal advantage. They may feel you should give just for the sake of giving.

Areas where others' strong feelings may frustrate you as you do not share their same passion:

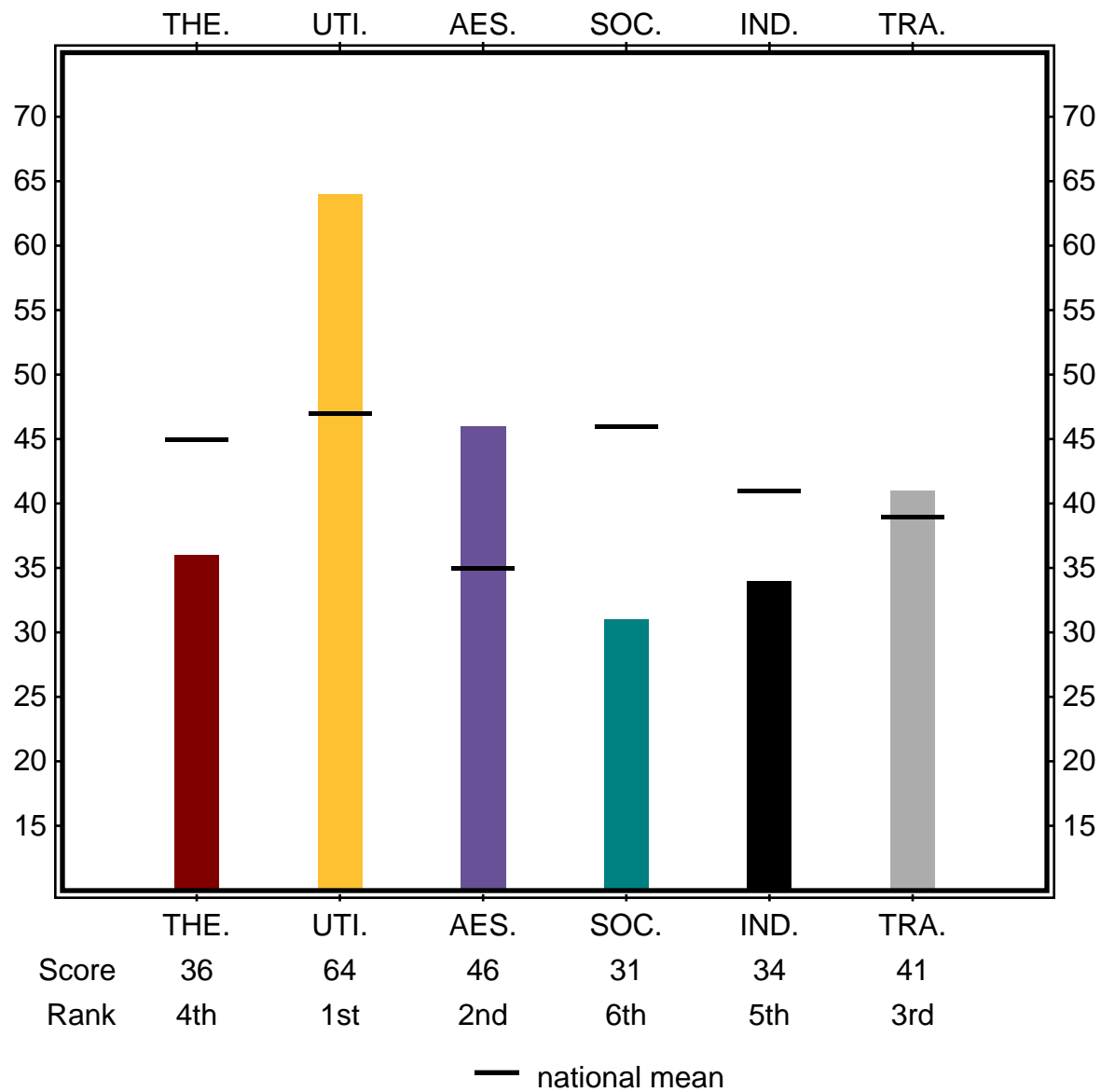
- Your self-reliance will cause you to feel uncomfortable around people who are always trying to help you or be too nice to you.



MOTIVATION INSIGHTS™ GRAPH

Julie Smith

11-10-2004



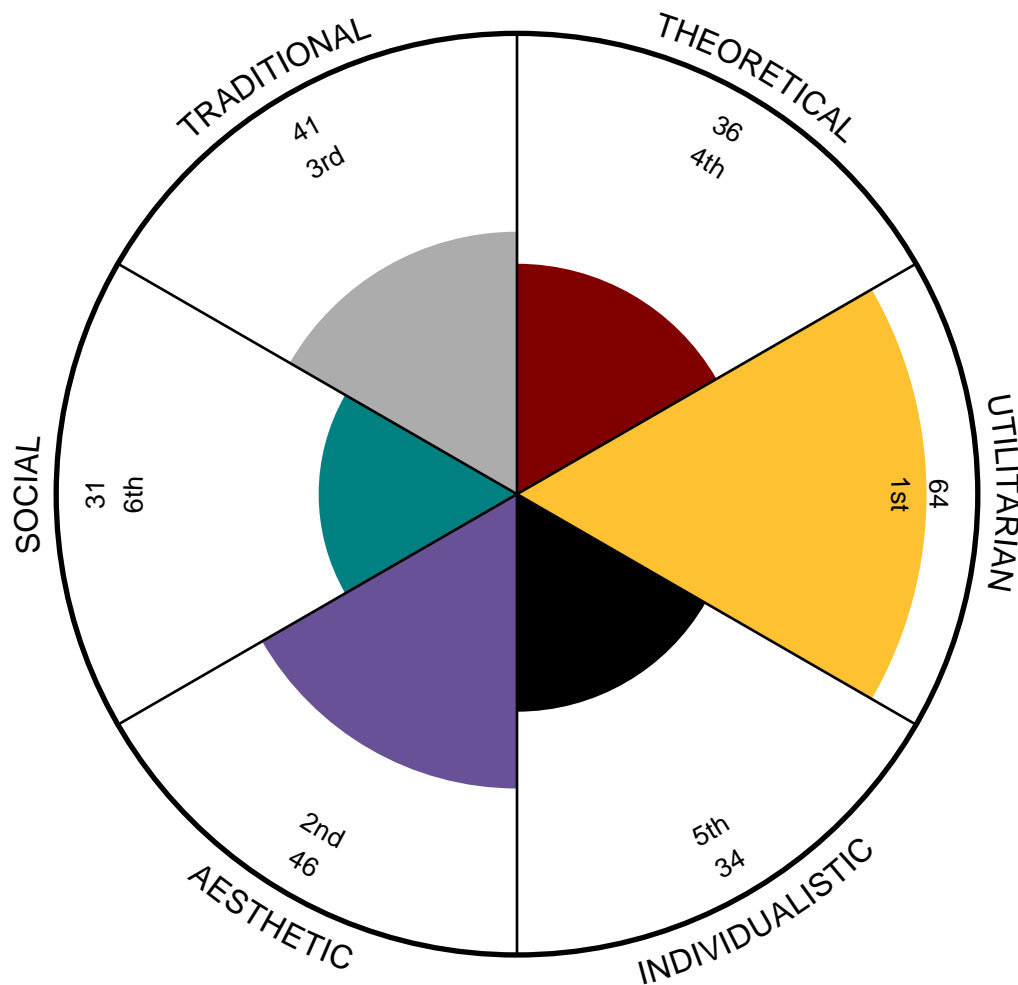
Norm 2003



ATTITUDES WHEEL™

Julie Smith

11-10-2004





VALUES ACTION PLAN

This Action Plan is your tool to contribute to the process of self-development and continuous improvement. As you have reviewed information in this document, please respond to the items below as they relate to your specific professional environment.

Area 1: The greater or global mission of the team or organization.

In the space below indicate briefly one or two areas of strength that you bring to the greater mission of the organization at large.

Area 2: An immediate or shorter-term mission, task or purpose of a smaller group of people with whom you work on day-to-day operations.

In the space below, indicate briefly one or two areas of strength (different from those above), that you bring to the shorter-term tasks or day-to-day operations.



QUALITY IMPROVEMENT ACTION PLAN

In the area below, respond briefly as indicated. Base your answers on some of the information and results presented in this document.

Action Point 1: Things I will keep on doing.

Indicate three things that you are doing very well already, and that you plan to keep on doing.

- 1.
- 2.
- 3.

Action Point 2: Things I will modify or change slightly.

Indicate 2 things that you will modify, adjust, or change slightly in order to increase personal effectiveness.

- 1.
- 2.

Action Point 3: Things I will stop doing, or try to eliminate.

Indicate one thing that you will try to stop doing in order to increase personal effectiveness.

- 1.

Today's Date: _____

Date to review with mentor or peer: _____



TEAM BUILDING SUMMARY OF WORKPLACE VALUES

Pick the most important item in each category from the Workplace Motivators report in the topic areas indicated. Leave a line blank if no primary item emerges to you. This summary sheet is to be used as a primary point of dialogue between you, your peers, and your manager, provided that all have copies of their own information. This communication should be a two-way process.

(Remember, these items are related to one's intrinsic drive factors, their 'hidden motivators' not readily observable. These items are of critical importance to one's long range success. This list illuminates why we do what we do.)

General Characteristics

1. Theoretical _____
2. Utilitarian/Economic _____
3. Aesthetic _____
4. Social/Altruistic _____
5. Individualistic/Political _____
6. Traditional/Regulatory _____

Value to the Organization

1. Theoretical _____
2. Utilitarian/Economic _____
3. Aesthetic _____
4. Social/Altruistic _____
5. Individualistic/Political _____
6. Traditional/Regulatory _____



TEAM BUILDING SUMMARY OF WORKPLACE VALUES

Keys to Managing and Motivating:

1. Theoretical _____
2. Utilitarian/Economic _____
3. Aesthetic _____
4. Social/Altruistic _____
5. Individualistic/Political _____
6. Traditional/Regulatory _____

Training, Professional Development and Learning Insights:

1. Theoretical _____
2. Utilitarian/Economic _____
3. Aesthetic _____
4. Social/Altruistic _____
5. Individualistic/Political _____
6. Traditional/Regulatory _____



TEAM BUILDING SUMMARY OF WORKPLACE VALUES

Continuous Quality Improvement:

1. Theoretical _____
2. Utilitarian/Economic _____
3. Aesthetic _____
4. Social/Altruistic _____
5. Individualistic/Political _____
6. Traditional/Regulatory _____

Continuous Quality Improvement: (choose two items from any values areas)

1. _____
2. _____