



## **Sales Achiever® Assessment Report**

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Report prepared on: **Joe Sample**  
Account Executive  
ABC Sales  
sample@sample.com  
5555555555

Report Type: Account Executive

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For more information contact:

Personnel Evaluation, Inc.

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The logo for Candidate Resources, Inc. (CRI), featuring the letters 'CRI' in a large, stylized, blue serif font with a slight shadow effect, set against a background of blue and white wavy lines.

**CRI**



Name:  
Company:

## Mental Aptitudes

### Mental Acuity



Mr. Sample is above-average in Mental Acuity, indicating he is a fast thinker with above-average comprehension skills. He has good reasoning and problem-solving capabilities and is able to determine a customer or prospect's need and present solutions to meet that need within a reasonable period of time.

### Business Terms



Joe has an average understanding of business terminology obtained either on the job or in a business class. This should enable him to understand the specialized language associated with his business, thus being able to communicate business matters with customers and prospects.

### Memory Recall



Mr. Sample is very interested in events happening in the world around him and should have a strong knowledge of competitive information and techniques, as well as economic trends which directly relate to his sales.

### Vocabulary



Mr. Sample's language skills are above average, enabling him to communicate effectively with customers, prospects and others. He is capable of highly complex interchanges and will exhibit confidence in his ability to interact with others.



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Joe's average Numerical Perception score indicates that he can handle detail work such as calculating orders, writing up contracts, etc., but his work will have to be checked for mistakes. A vision problem, tension, or carelessness may affect the Perception score.

## Mechanical Interest



Joe has high mechanical interest and probably has the ability to understand information regarding mechanical equipment, sell such equipment or learn how to apply technology to his sales position.

## Personality Dimensions

### Energy



Mr. Sample has a well-balanced tension and drive level. He will energetically prospect and pursue new business, but remains calm enough to maintain his level of concentration and focus when making sales presentations.

### Flexibility



Joe is a very quality-minded, reliable sales rep with a high degree of integrity and strong ethics. He has a strong interest in providing quality service and products to customers and prospects, but is not flexible or adaptable to change. This could cause him to experience difficulty handling multiple job demands and assignments. He tends not to be an innovative, free-thinking person who creates new sales techniques, nor will he be one who promotes new uses for existing products or services, but rather will be one who sticks with proven applications as much as possible. He is likely to agree to change only when he is convinced the change is necessary. Even though the company can trust him and know he will be concerned that customers' needs are being met, they cannot expect frequent, imaginative or fresh ideas from him.



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### Organization



Mr. Sample does not exhibit a great deal of interest in planning his time and activities. Although he does have good intentions, his plans are not always thorough and he may not take full advantage of the time and resources he has available. Because of this, he could overlook important appointments, fail to follow-up on prospects and otherwise handle matters less effectively. A high score in Mental Acuity may compensate for a low score in this dimension.

### Communication



Joe enjoys working with people and is a very open, sharing collaborator. He can easily and comfortably share his own feelings, ideas and knowledge with customers and prospects, and would not be happy in an environment where he has no opportunity to interact with others.

### Emotional Development



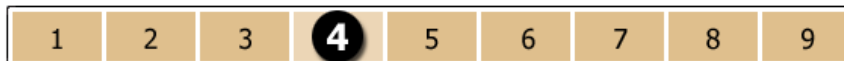
Mr. Sample has a good level of self-confidence and self-esteem, but not so much as to be unrealistic. He is willing to wait a reasonable time for sales to close or other results to occur without becoming upset or frustrated.

### Assertiveness



Joe can take control, maintain order, and express his opinions to customers and prospects, but will not actively seek out conflict. He will attempt to influence and direct the buying decision and will ask for the sale, but not to the point of appearing unnecessarily demanding.

### Competitiveness



Mr. Sample has a competitive instinct and desire to win, but is team-spirited and synergistic. He has some competitive drive, but would not want to risk harmonious relationships with established customers by attempting to upsell them. When prospecting to develop new business, he will place a stronger emphasis on developing rapport with the prospect than on selling a high volume of products or services.



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### Mental Toughness

1	2	3	4	<b>5</b>	6	7	8	9
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Joe can empathize with customers, prospects and others, but has enough mental toughness to deal with the negative aspects of sales, i.e., sales rejection, having to meet a quota, etc. He can work long or unusual hours without becoming unduly discouraged, and only occasionally will need reinforcement and support.

### Question/Probing

1	2	<b>3</b>	4	5	6	7	8	9
---	---	----------	---	---	---	---	---	---

Joe is a trusting individual who accepts most information at face value. Even though he usually exhibits a positive, enthusiastic attitude, he can accept excuses for not buying too easily, rather than asking questions to find alternatives to offer.

### Motivation

1	2	3	4	5	6	7	<b>8</b>	9
---	---	---	---	---	---	---	----------	---

As a sales rep, Joe is easily motivated when the right rewards are offered. He has good initiative and will take risks when the potential for profit and recognition exists. He is always looking for a chance to obtain recognition for his efforts. He will be willing to put in extra hours and exert greater effort to increase sales, provided he feels he will be rewarded for his efforts. Status and recognition are more important than a steady job or a stable paycheck, even if it means long hours or frequent travel.

## Validity Scales

### Distortion

1	2	3	4	<b>5</b>	6	7	8	9
---	---	---	---	----------	---	---	---	---

Mr. Sample is reasonably fair in assessing his strengths and weaknesses. He has some characteristics that he is not completely happy with and tends not to show others. The validity may be slightly affected by his indirect answers.

### Equivocation



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He has scored within our acceptable equivocation range.

**This report is confidential and is an opinion based on assessment results only. Its contents should contribute approximately 1/3 to developmental discussions since it is only one of several evaluatory and feedback resources.**

ScoreSheet



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Account Executive

Mental Aptitudes											
		1	2	3	4	5	6	7	8	9	
<b>Mental Acuity</b>	Slow to Learn						6	●	●	●	Fast to Learn
<b>Business Terms</b>	Uninformed				●	●	6				Knowledgeable
<b>Memory Recall</b>	Unaware						●	7	●	●	Aware
<b>Vocabulary</b>	Limited				●	●	●	7			Strong
<b>Numerical Perception</b>	Imprecise					5		●	●	●	Accurate
<b>Mechanical Interest</b>	Indifferent				●	●	●	7			Interested

Personality Dimensions											
		1	2	3	4	5	6	7	8	9	
<b>Energy</b>	Restless				●	5	●				Calm
<b>Flexibility</b>	Flexible			●	●	●	●			8	Rigid
<b>Organization</b>	Disorganized			3	●	●	●				Planful
<b>Communication</b>	Reserved				●	●	6	●			Interactive
<b>Emotional Develop.</b>	Impatient				●	5	●				Tolerant
<b>Assertiveness</b>	Cooperative					5	●	●	●	●	Authoritative
<b>Competitiveness</b>	Team Player				4	●	●	●	●		Individualist
<b>Mental Toughness</b>	Sensitive				●	5	●	●			Tough
<b>Questioning/Probing</b>	Trusting			3	●	●	●	●			Skeptical
<b>Motivation</b>	Security						●	●	8	●	Recognition

Validity Scales											
		1	2	3	4	5	6	7	8	9	
<b>Distortion</b>	Frank Answer	●	●	●	●	5	●				Exaggerates
<b>Equivocation</b>	Chose Alternate	●	●	●	●	5	●				Chose Middle

**STANINE:** The STANINE is a system of measurements which divides the population into nine parts.

**AREAS OF CONCERN** - Scores of 1 OR 2 in any of the following dimensions:  
*Energy, Flexibility, Emotional Development OR Mental Toughness* are areas of concern.

**NOTE:** Areas with dots and brackets [ ● — ● — ● ] are of primary importance with the dots and brackets reflecting the most



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desirable range for an individual to score in to have those characteristics. Areas without dots and brackets are secondary areas that provide additional information regarding the individual. Scores within this range are shown with a number inside a blue circle. Those outside the desired range, or with no range identified, will have a number inside a black circle.





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## **Leadership Traits Assessment**

### **Introduction**

This report section evaluates Joe's traits in five key areas of leadership:

- Planning
- Organizing
- Staffing
- Coaching
- Facilitating

Areas with good leadership traits are identified on the following pages as well as those where training or development would be beneficial.

Joe may or may not be one of the better people employed in a specific organization. If Joe is a top performer in your organization, when compared to top performing leaders across America and Canada, this report segment may still highlight areas where development could make the individual a still better leader. Therefore, this Leadership Traits assessment should be reviewed in light of "what could make a good leader even better," with understanding that within human beings, there is always room for improvement.



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## **Leadership Potential Summary Report**

**for: Joe Sample**

**Joe has good leadership potential in the following area(s):**

- Coaching
- Facilitating

**Joe's Training & Development Needs are:**

- Planning - learn how to better plan and organize required job functions, activities and requirements.
- Organizing - learn how to organize and make better use of time and assets required to successfully perform the job or job requirements.
- Staffing - learn how to make better staffing selections as well as how to train, motivate and lead others.



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# Sales Traits Assessments

## Introduction

This report section evaluates Joe's traits in key areas of sales:

- Persistence and consistency
  - Ability to meet and communicate effectively with people
  - Ability to command respect
  - Setting goals to win, excel and achieve
  - Developing rapport
  - Identifying need or desire
  - Presenting product/service to fill prospect's needs
  - Dealing with objections
  - Closing the sale
  - Learning speed & efficiency
- Changing, growing and learning new concepts and ideas

Areas with good sales traits are highlighted with traits identified in which training or development would be beneficial.

Joe may or may not be one of the better people employed in a specific organization. If Joe is a top performer in your organization, when compared to top performing salespeople across America and Canada, this report segment may still highlight areas where development could make the individual a still better salesperson. Therefore, this Sales Traits Assessment should be reviewed in



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light of "what could make a good salesperson even better," with understanding that within human beings, there is always room for improvement.

## Sales Potential Summary Report

### **Joe has good sales potential. Strengths Include:**

- Learning speed and Efficiency
- Persistence and Consistency
- Ability to meet and communicate effectively with people
- Changing, growing and learning new concepts and ideas
- Developing Rapport
- Identifying need or desire
- Presenting Product/Service to fill prospect's needs
- Dealing with objections
- Closing the sale

### **Yet, further development in the following critical area(s) will be beneficial:**

- Ability to command respect
- Setting goals to win, excel and achieve



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## **Interview Questions**

### **Introduction**

Following are the interview questions which an interviewer may choose to use in the candidate interview process.

These interview questions are generated to establish basic traits critical for all employees.

The interview questions that follow are for a candidate who has prior work experience. In the event the candidate does not have prior work experience, the questions may need to be modified by the interviewer to fit the situation.



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**Interview Questions for Flexibility**

**Flexibility** - Measurement of the individual's level of flexibility, creativity, integrity and adaptability to change.



**Probes**

**Interpretive Guides**

Tell me about a time in a previous sales position you had to make a quick decision without guidelines or precedents to follow. Describe the circumstances and how you dealt with the situation.

Did the candidate exhibit good judgment in his or her decision making? Was the decision based on facts or emotions? Did the candidate exhibit good leadership skills? Describe the final decision.

Tell me about a time in a previous sales role a customer, or someone within your company asked you to do something unethical. How did you handle the matter and what was the outcome?

Did the candidate take a firm stand on personal values and principles? Did the candidate take appropriate, mature action? Did the candidate exhibit good judgment in the method in which he or she handled the situation? Was there any indecision on the part of the candidate?



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the part of the candidate?

Describe how you typically closed a new account. Did you tend stick with the "tried and true" closes, or did you sometimes deviate and try new closings? Give an example of a way you handle closing differently.

Tell me about a time when one of your customers or prospects wanted to purchase a product or service you felt was not in his or her best interest. How did you handle the situation and what was the outcome?  
decisions independently?

Does it appear the candidate was stubborn and unwilling to accept his or her customer's purchasing decision, or does it appear the candidate was justified in believing the product or service would not meet the customer's needs? Did the candidate handle the situation tactfully and in a manner which led to a favorable close?

Does it appear the candidate has the flexibility to make to changes or try new ways of doing things? Does the candidate admit to being hesitant about changing his or her approach to selling? Does the candidate exhibit the ability to make

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<p><b>Organization</b> - Measurement of the individual's desire to organize assignments and projects to better utilize time and resources.</p>	

**Probes**

**Interpretive Guides**

Tell me about a time you missed an appointment, were late for a meeting or experienced other problems because you did not plan well enough in advance. the experience he or she described

Was the candidate on time for this interview? If not, was the excuse justifiable? Does it appear the candidate learned from this first question?

Describe how you typically kept yourself organized, and prioritized sales calls, follow-ups, etc., in your former sales position. Did you use any planning tools to help keep yourself organized and if so, what were they? stay organized, i.e., a daily planner, computerized schedule, etc?

Does the candidate have specific steps he or she takes to stay organized? Does the candidate appear to understand how to prioritize tasks? Does the candidate use planning tools to help organized and if so, what were they?

Tell me about a time, in a previous sales position, you went into a sales presentation unprepared and had to "wing it." What was the final outcome of the sales call? Do you believe the outcome would have been different had you been better organized?

Has the candidate been able to capitalize on his or her ability to improvise? Does the candidate appear to understand the importance of planning, yet also have the ability to be flexible and change plans, when necessary? Does it appear the

**Interview Questions for Organization**

Describe your office or work area in your former sales position. Was everything neatly put in place, or did you tend to function better in chaotic surroundings? candidate takes pride in his or her ability to "change horses in mid-stream?" Is the candidate sharp enough to keep priorities in his or her head without losing sight of them?

Is the candidate fairly tidy, or does the candidate thrive on chaos and disarray? How important is tidiness in this position? Will others come into or see the candidate's office or work area, or is it secluded?

**Interview Questions for Questioning & Probing**

**Questioning/Probing** - Measurement of the individual's desire to question and probe, rather than accept instructions, directives and information at face value.

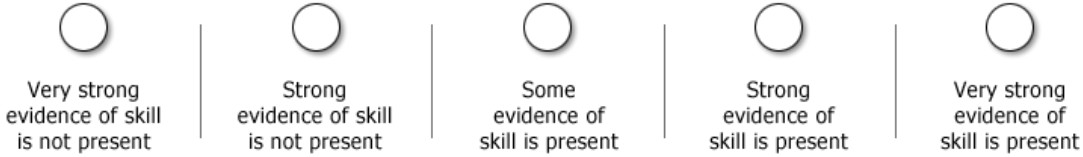




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#### Probes

#### Interpretive Guides

Describe the most difficult objection you can remember having to overcome in your sales career. How did you initially respond to the objection and how did you turn it into a sale?

Does the candidate have specific steps he or she takes in order to deal with an objection? Was the candidate's approach to making the sale logical and mature? Was the objection the candidate encountered a difficult one, from your point of view, or one in which he or she is likely to encounter time and time again?

Tell me what steps you took, in prior sales positions, to gather information necessary to understand a prospect or customer's true need or desire.

Does the candidate appear to understand the importance of understanding the customer's need or desire? Does the candidate have knowledge of how to determine these factors and if so, does he or she apply this knowledge to the process?

We all assume more than we should, from time to time. Tell me about a time when you assumed too much and problems arose due to your not asking enough questions of your customer or prospect.

Does it appear the candidate is overly assuming? Since assuming people can sometimes tell more than they should, did the candidate talk extensively about personal matters which had little relevance to the interview or job?

How did you maintain a positive attitude in past sales positions? Do you typically go to a sales call with a positive attitude, or do you tend to fear you won't make the sale?

Does the candidate appear to have a positive working attitude? Does he or she come across positive and enthusiastic? Does the candidate have certain actions to follow if he or she begins to feel negative?

### Interview Questions for **Motivation**

**Motivation** - Measurement of the individual's achievement orientation and internal motivation to initiate changes and take risks in order to advance.



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#### Probes

#### Interpretive Guides

In your prior sales job, what was the biggest change you were faced with and how did you adapt to that change?

Does the candidate seem to thrive on change? Does it appear the candidate has good skills to cope with change? Does the candidate appear to become bored or restless if changes are not frequently made?

Give me an example of a time you took a risk and won. How did your accomplishment make you feel? How do you believe you would have felt if you had taken that risk and failed?

Is the candidate a big risk taker? Does it appear the risks the candidate has taken are reasonable and calculated, or does the candidate appear to be somewhat impetuous? Does it appear the candidate is able to accept occasional failure?

Other than money, describe what really motivated you in prior sales positions to increase sales by an even greater margin than what was expected of you.

Does the candidate appear to understand what motivates him or her and if so, are these factors reasonable and available in this position? If they are not currently available, would it be possible to secure them for this candidate?

What type of sales compensation plan have you most enjoyed in the past - straight salary, commission only, draw plus, etc. What most attracts you to this type of compensation plan?

In this position, will the candidate be on the same type compensation plan as the one he or she most enjoyed in the past. If not, could the compensation plan be structured to better meet the candidate's needs?

### Development Suggestions

#### Introduction

The behavior of each individual is influenced by genetics, biochemistry and environment. The individual's scores related in this assessment depict the individual as of the date and time the individual took the assessment.



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Major changes in biochemistry and/or environment can change the scores on the assessment. Effective training and/or development that the individual is exposed to can and should also affect scores.

Consequently, for those individuals who seek to achieve higher levels of productivity and success in their jobs and life, and for those employers who desire such for the people they employ, we have carefully reviewed the training and development materials available in the marketplace and have selected for recommendation those that we deem appropriate to suggest in areas where the person assessed could benefit most from growth and development. The recommended development suggestions are on the following pages. We trust that you will find these suggestions helpful.

Additionally, one year self-directed development programs are available for individuals working in sales, customer service or leadership roles. These programs provide training and development suggestions specifically tailored to these roles. Please contact the employer representative responsible for employment assessments to learn more about these programs.



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**Flexibility** - Measures the flexibility and integrity orientation of the person compared to rules, laws, guidelines, etc.

You are a very quality-minded, reliable individual with a high degree of integrity and strong ethics. You have a strong interest in living up to your promises, and expect the same from others. Since you are, at times, a little inflexible, you could experience difficulty changing direction in your life, even if such a change appears necessary. You prefer to stick with the "tried and proven" ways of doing things, rather than attempting to handle tasks or resolve problems a new way. You are likely to agree to change only when you are convinced the change is necessary.

Your self-affirmation sentence:

***"I am flexible and can adapt to change."***

### Steps to Effect Change

1. You need to learn that handling life's ever-changing demands requires that you become more flexible and expedient. This enables you to handle sudden, critical demands placed on you. Outlining "what if" emergency events and role-playing can start you thinking about alternative solutions to common problems or sudden changes in your personal environment.
2. You need reinforcement discussions when changes occur in your life. You should constantly remind yourself of the need to maintain a flexible, less rigid approach to life.
3. To develop the confidence to create and implement change, commit to making one minor change in your life each month. For instance, if you always follow a certain routine in the mornings when getting ready for work, reverse two activities. Once you see that minor changes do not cause major problems and may actually be beneficial, you will become more willing to make significant changes when necessary.

**Organization** - Measures a person's attitude about organization, planning, how tasks are performed and how one's life is lived.

Planning your time and activities in advance does not come naturally to you. Since your plans are not always thorough, you may not take full advantage of the time and resources you have available to you to reach goals and objectives. A high score in Mental Acuity may help you compensate for a low score in this dimension.

Your self-affirmation sentence:

***"I am organized in my life so I achieve more."***

### Steps to Effect Change

1. Good time and space management calls for a specific activity plan to identify priorities by the day or week. For sixty days, list daily plans on paper, then mentally list the six most important things to be done the following day, ranking them by priority, and the time allotted to each item. You will then have a good grasp of what must be done, prior to beginning each day.
2. To avoid losing track of important details you might need for certain tasks, such as filing your income tax, good recordkeeping is mandatory. Select a certain place to keep important records and discipline yourself to always put important papers in that one location.
3. Daily, weekly and monthly planning - even yearly planning - will help keep you on an organized and productive basis. Set goals and reach them.



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4. Avoid any distractions which take you off track. If necessary, tell people around you what you are attempting to accomplish, so you will be less likely to be interrupted.

**Question/Probing** - Measures the tendency not to accept information at face value.

You have a very trusting nature and tend to accept most instructions, directives and information at face value. Even though you have a positive, enthusiastic attitude, you may be so trusting that you allow others to take advantage. When problem-solving or troubleshooting complex issues, you may not probe far enough to see the whole picture.

Your self-affirmation sentence:

***"I ask questions."***

### Steps to Effect Change

1. Gullible people can be taken advantage of very easily; you need to develop the ability to question and develop probing skills.
2. Mental exercises, such as word games, mathematics and logic puzzles, even newspaper crossword puzzles, help to develop the "probing" process and are quite useful in developing your "brain power."
3. Cynicism is not attractive, but the trusting person can often be a detriment by disclosing private information much better kept confidential. Develop the ability to be a little more closed and therefore a little less open to exploitation.
4. Prior to making any type of commitment, signing any legal contracts, making any big purchases, etc., give yourself time to research and think about the situation, rather than entering into the matter too quickly.



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## Online Courseware

### Flexibility

If your work requires interaction with others, your flexibility level may be affecting those relationships. You may benefit from the following development suggestions:

### Seminars / Workshops:

- Models for Management™ by Teleometrics International

### Self-paced e-Learning:

- [Models For Management](#) - Module 6: Empowerment should be of particular interest for those wanting to explore how flexibility or lack thereof relates to the empowerment of others and power dynamics.

To access recommended online courseware, visit [www.lmiuniversity.com](http://www.lmiuniversity.com).



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## **Online Courseware**

### **Organization**

When working with others, your organizational preferences level may be affecting how effectively you work them. You may benefit from the following development suggestions.

### **Self-paced e-Learning:**

- [Effective Personal Productivity](#) - Lesson 1: The Nature of Productivity.
- [Effective Personal Productivity](#) - Lesson 2: Goals Achievement Through Time Management

To access recommended online courseware, visit [www.lmiuniversity.com](http://www.lmiuniversity.com).



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## Online Courseware

### Question/Probing

When interacting with others in a work environment, consider how your questioning/probing level may affect these relationships. You may benefit from the following development suggestions:

### Seminars / Workshops:

- Models for Management™ by Teleometrics International

### Self-paced e-Learning:

- [Models For Management](#) - Module 3: Communication and Interpersonal Relationships should be of particular interest for those wanting to explore how questioning/probing relates to communication style and effective relationships.

To access recommended online courseware, visit [www.lmiuniversity.com](http://www.lmiuniversity.com).