



SALES EFFICACY PROFILE

Last Name: Doe
First Name: John
Organization: ABC Corporation
Location: Chicago, ILL
Assessment Date: 02/14/2006

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SALES EFFICACY PROFILE

PCFA

LOCATION N: 34
ID: 123456789
LAST NAME: Doe
FIRST NAME: John

HIGHEST GRADE COMPLETED: 12
JOB(S) APPLIED FOR: Sales
VOCATIONAL QUOTIENT: 46
JPF TYPE: 3

PROSPECTING FOR CUSTOMERS: Moderate
IDENTIFICATION OF QUALITY PROSPECTS: Moderate
EASE OF CONTACT INITIATION: Low
TYPE OF INITIAL APPROACH: Good
DEGREE OF INTUITIVENESS: Low
DEGREE OF PERSONAL TOUCH: Moderate
TENDENCY TO PROBE FOR MOTIVATION: Good
ABILITY TO MOTIVATE CONTINUITY OF ENGAGEMENT: Moderate

PROFICIENCY IN INFORMATION COLLECTION: Moderate
PROFICIENCY OF ANALYSIS OF CUSTOMER'S ISSUES: Good
EFFECTIVE FORMULATION OF CUSTOMER'S NEEDS: Moderate
CONSISTENCY OF CUSTOMER FOCUS: Good
CONSISTENCY OF PRODUCT/SERVICE FOCUS: Moderate

IDENTIFICATION OF PRIORITIES: Good
OBJECTIVITY OF ASSESSMENT: Moderate
PRODUCT/SERVICE INFORMATION PROFICIENCY: Moderate
FORMULATION OF PRODUCT/SERVICE NECESSITY: Moderate
COMPARATIVE PRODUCT/SERVICE ANALYSIS: Low
ENGAGEMENT OF CUSTOMER IN BUYING DYNAMICS: Low
INTERACTIVE QUESTIONING: Moderate
MANAGEMENT OF PRIORITIES BY LOGIC: Moderate
MANAGEMENT OF PRIORITIES BY EMOTION: Low
PERSONALIZING PRIORITIES: Low

TIMELY IDENTIFICATION OF SALE DETERRENENTS: Low
PROBING FOR AND HANDLING OF EMOTION: Low
SPONTANEITY OF ENGAGEMENT: Low
OVERCOMING RESISTANCE BY EMOTION: Low
OVERCOMING RESISTANCE BY LOGIC: Moderate
EFFICACY IN EDUCATING CUSTOMERS: Moderate
PROFICIENCY IN INITIATING BUYING BEHAVIOR: Low

CAPITALIZING ON MOMENTUM: Moderate
EFFICIENCY IN SECURING COMMITMENT: Moderate
EFFICIENCY IN ESTABLISHING TIMELINES: Good
FOCUS ON TRANSACTION DETAILS: Moderate
CONSISTENCY OF FOLLOW-UP: Moderate

SITUATIONAL CONTROL: Low
INTERPERSONAL STYLE: Detached, formal, rigid, uncompromising
PERFECTIONISM: Moderate
FLEXIBILITY: Low
PREFERENCE FOR CUSTOMER RELATIONSHIP TYPE: Controlled and uncompromising
HANDLING OF DISAPPROVAL: Low
DEPENDABILITY: Moderate
PERSISTENCE: Moderate
ORGANIZATION: Moderate
CREATIVITY OF INTERPERSONAL INTERACTIONS: Low
TENURE ESTIMATE: Low to moderate

ELP = EXPECTED LEVEL OF PERFORMANCE
TLP = TANGIBLE LEVEL OF PERFORMANCE
PLP = PROJECTED LEVEL OF PERFORMANCE

	ELP	TLP	PLP		
VOCATIONAL SUITABILITY:	4	4	3	ELP-PLP FIT:	67%
VOCATIONAL MATURITY:	4	4	3	TLP-PLP FIT:	82%
VOCATIONAL ADAPTABILITY:	4	4	3		
VOCATIONAL EFFICACY:	4	4	3		
VOCATIONAL DETERRENTS:	1	2	2		

<u>COMPETENCIES</u>	<u>ELP</u>	<u>TLP</u>	<u>PLP</u>	<u>VOCATIONAL MATURITY:</u>	<u>ELP</u>	<u>TLP</u>	<u>PLP</u>
ADVERTISING	4	3	1	SENSE OF DIRECTION	4	3	1
SCIENTIFIC	2	2	0	COMPREHENSION OF GOALS	5	3	2
MECHANICAL	2	2	0	USE OF JUDGMENT	5	4	3
MANUFACTURING	2	2	0	WORK ETHICS	4	4	4
BUSINESS – CLERICAL	3	2	0	NEED FOR SUPERVISION	4	3	3
SALES	5	2	1	DOMINANCE	3	3	5
CUSTOMER SERVICE	5	4	4	OCCUPATIONAL CREATIVITY	3	3	2
HUMAN RESOURCES	3	2	1	OCCUPATIONAL COMMITMENT	5	4	3
MANAGERIAL	4	5	4	OCCUPATIONAL STABILITY	4	4	3
				GEOGRAPHICAL STABILITY	4	4	3
				VOCATIONAL EFFECTIVENESS	4	4	3
				EMPLOYMENT STABILITY	5	4	1
				SUPERVISION RESPONSIVENESS	4	4	4
				PUNCTUALITY	4	4	5
				<u>VOCATIONAL EFFICACY:</u>			
				PERFECTIONISM	3	4	4
				OPENNESS - COMMUNICATION	5	4	3
				CONSCIENTIOUSNESS	5	4	3
				PERSERVERANCE	4	3	2
				SELF-RESTRAINT	3	3	1
				COURTESY	5	4	3
				NEED FOR STRUCTURE	4	4	3
				AMBITION	3	3	4
				AUTONOMY	3	3	4
				CAUTION	3	4	4
				PERCEPTIVENESS	4	5	3
				ACCEPTANCE OF CRITICISM	4	4	4
				PRAGMATISM	4	4	3
				EXPEDIENCE	4	3	4
				COMPETENCE	5	4	2
				POSITIVE AFFECTIVITY	4	4	3
				NEGATIVE AFFECTIVITY	1	1	2
				AFFECTIVE LABILITY	1	1	4
				BEHAVIORAL LABILITY	1	1	1
				PHYSICAL LABILITY	1	3	3
				WORKPLACE RESILIENCE	4	4	2
				WORKPLACE VULNERABILITY	1	2	4
				HISTORY OF DISABILITY	0	4	4
				FINANCIAL STABILITY	3	2	1

LEVELS: 0 = NONE 1 = LOW 2 = MILD 3 = MODERATE 4 = HIGH 5 = VERY HIGH << = APPLIES

EXPECTED JOB-SPECIFIC SKILLS, ABILITIES AND APTITUDES

Individuals with this profile type seem to have interest in bringing others to a point of view by personal persuasion, using sales and promotional techniques. It is possible that the job applicant can satisfy this interest in a variety of sales jobs, from selling technical products to services. The applicant may be equally effective working in stores, sales offices, or in customers' homes.

The special characteristics and experiences of the individuals in this category often lead to their preference for activities, vocations, and professions which involve persuasive approaches to other individuals, or groups of people, in order to attain organizational goals or economic gain. They may manifest low degree of interest and competencies in the area of symbolic and systematic activities.

They tend to manifest leadership tendencies, interpersonal and persuasive competencies and skills; while on the other hand, they frequently lack scientific interests, skills, and efficacy. These individuals frequently prefer and engage in enterprising occupations and situations in which they can engage in preferred activities, and subsequently avoid those activities which are usually demanded by investigative occupations or situations. They are most likely to use their enterprising skills to solve problems both at work and in personal life.

On one hand, they often perceive and represent themselves as somewhat aggressive, popular, self-confident, sociable, possessing leadership and speaking abilities. On the other hand, they show a lack of scientific, analytical, and methodical skills, interests, and abilities. They highly value political and economic achievement, both their own, and those of others.

Others often perceive and describe them as acquisitive, domineering, optimistic, adventurous, energetic, pleasure-seeking, ambitious, somewhat exhibitionistic, self-confident, at times argumentative, flirtatious, sociable, dependent, impulsive, and talkative.

They usually choose professions and activities which allow them freedom to use imagination, creativity, and own ideas to perform the job, stand out from other coworkers, learn new way of doing things, and have new duties assigned from time to time. However, they too enjoy working in a stable situation which offers financial and job security, fair promotions, predictability, and a latitude to perform work within the comfortable boundaries of their own efficacy.

Being enterprising types, they also enjoy jobs such as banker, lawyer, manager or salesman. They cope with their world by selecting goals, values, and tasks through which they can express their adventurous, dominant, enthusiastic, energetic, and impulsive qualities. Persons with this profile type are characterized also by their persuasive, verbal, extroverted, self-accepting, self-confident, oral aggressive, exhibitionistic attributes.

These individuals tend to perceive themselves as leaders, they tend to avoid well-defined language or work situations requiring long periods of intellectual effort, they are extracognitive, they prefer ambiguous social tasks, and they have a greater concern with power, status, and leadership.

The following are personal characteristics, professional qualifications, training, skills, aptitudes, and various job requirements which are usually required from a job trainee/applicant for this category of jobs and professions:

DESIRABLE PERSONALITY TRAITS, INTERPERSONAL SKILLS, AREAS OF SELF-EFFICACY:

- good knowledge and understanding of customers and their preferences and needs;
- ability to hold people's attention and influence them;
- dealing with a variety of people on an ongoing basis;
- have a good understanding of changing business trends and customer types and their needs;
- ability to evoke and maintain interest and emotional involvement on the part of a prospective customer;
- making judgments and decisions based on analysis of customers' needs
- comfortably expressing personal feelings;
- have excellent knowledge of products and services being promoted;
- effectively utilize common workplace technology and systems;
- use computers to process customer information and sales;
- have a good degree of technology appropriate to their customer base;
- have sufficient knowledge to advise how to apply technology to customer-specific tasks and applications;
- have sufficient knowledge to provide some troubleshooting of customer-specific technology and products;
- demonstrate effectiveness in working with people of various cultural, social, ethnic and economic backgrounds;
- ability to do customer profiling and identify the most viable segments of the customer base;
- ability to develop and maintain a rapport and a business bond with customers regardless of extent possible interpersonal differences;
- engage in successful negotiation to arrive at a sale decision;
- develop mutual trust in transactions with customers and make them comfortable to disclose and discuss their available budget;
- ability to elicit and secure customer's commitment during early phases of interaction;
- ability to quickly and effectively either create an emotionally motivated prospect or be able to recognize and qualify the deal as no-win;
- competence in quickly developing new strategies and approaches when needed or knowing when not to pursue dead end leads and moving to more viable customers and transactions;

- provide a scope of services specific to products and technology being represented and promoted;
- engage in successful negotiation to arrive at a sale decision;
- personal quality: developed social skills, perceptiveness, a sense of interpersonal appropriateness, and ability to create a level of comfort in others when discussing new sales and transactions;
- develop up-to-date knowledge of competition and:
 - their sales strategies and techniques;
 - their product & company strengths
 - their product & company weaknesses
 - which buyers they are likely to win with
 - which buyers they are vulnerable to lose with
 - who their best and worst customers are;
- creative thinking;
-

DESIRABLE GENERAL APTITUDES:

The following is the usual range of aptitudes normally required for a variety of work activities in this vocational domain.

APTITUDES	EXPECTED LEVEL
General Learning Ability	Moderate to High
Verbal Aptitude	High
Numerical Aptitude	Moderate to High
Spatial Aptitude	Moderate
Form Perception	Moderate to High
Clerical Perception	Moderate
Motor Coordination	Moderate
Finger Dexterity	Moderate
Manual Dexterity	Moderate
Eye-Hand-Foot Coordination	Moderate to High
Color Discrimination	Moderate to High

REASONING LEVEL:

- apply common sense understanding to carry out instructions furnished in written, oral, diagrammatic, or schedule form; deal with problems involving several concrete variables in or from standardized situations; deal with a variety of concrete variables in situations where only limited standardization exists;
- can read and follow multi-step directions; read and interpret common legal forms and manuals; use math in business, such as calculating discounts; create and use tables and graphs; communicate personal opinion in written form; write an accident or incident report; can

integrate information from multiple texts, charts, and graphs as well as evaluate and organize information; can perform tasks that involve oral and written instructions in both familiar and unfamiliar situations.

MATH LEVEL:

- add, subtract, multiply, and divide all units of measure; perform four operations with the like common and decimal fractions; compute ratio, rate, and percent; draw and interpret bar graphs; perform arithmetic operations involving all American monetary units; compute discount interest, profit and loss, commission, markup, and selling price, proportion variables

LANGUAGE LEVEL:

READING:

- proficiency in reading a variety of materials such as novels, magazines, atlases, manuals, and encyclopedias;
- ability to read and comprehend safety rules
- ability to read and comprehend technical manuals and instructions relevant to the products and/or services which they represent and promote to the public

WRITING:

- write reports and essays with proper format, punctuation, spelling, and grammar, using all parts of speech; prepare business letters, expositions, summaries, and reports

SPEAKING:

- speak before an audience with poise, voice control, and confidence, using correct English and well-modulated voice;
- participate in panel discussions, dramatizations and debates.

TASKS DUTIES AND RESPONSIBILITIES COMMONLY EXPECTED TO BE PERFORMED:

- Operates computerized cash register to conduct sales transactions; handles cash, and makes change as required.
- Sells merchandise and/or rents equipment; advises customers on merchandise price, features, and/or on fees and services.
- Assists individual and/or institutional customers in the ordering and, as appropriate, delivery of merchandise.
- Prepares routine daily reports such as sales, accounts receivable/payable, orders, credit card receipts, and/or bank deposits.
- Receives and displays merchandise and/or equipment in accordance with established policies and procedures; ensures that stock levels and displays are in accordance with established standards.
- Performs general floor maintenance and housekeeping; monitors and maintains the condition and safekeeping of merchandise and/or rental equipment.
- Oversees the processing of routine returns and buybacks, as appropriate; coordinates the return and replacement of defective merchandise.
- Prepares cash register reconciliation and miscellaneous routine reports.
- Identifies and resolves discrepancies in invoices and orders.
- Inspects equipment and facilities to ensure customer and employee safety.
- May create displays and assist in designing marketing campaigns.
- May train and supervise student and/or temporary employees in day-to-day customer service activities.
- Performs miscellaneous job-related duties as assigned.

JOB-RELEVANT KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:

- Ability to prepare routine administrative paperwork.
- Ability to operate a computerized cash register.
- Ability to secure and handle cash.
- Knowledge of basic cash management procedures.
- Ability to safely use cleaning equipment and supplies.
- Ability to sort, check, count, and verify numbers.
- Knowledge of retail floor sales techniques.
- Knowledge of retail floor merchandising and stock control procedures.
- Knowledge of basic visual merchandising techniques.
- Knowledge of shop security and safety procedures.
- Knowledge of customer service standards and procedures.

COMMON PHYSICAL DEMANDS:

The following is the usual range of physical abilities normally required for a variety of work activities in this vocational domain:

ABILITIES	COMMON REQUIREMENTS
Strength	Low
Balancing	Low
stooping	Low
Kneeling	Low
Crouching	Low
Crawling	Low
Reaching	Moderate to high
Handling	Moderate to high
Fingering	High
Feeling	High

COMMUNICATION ABILITIES:

ABILITIES	EXPECTED LEVEL
Auditory	High
Hearing	High
Tasting/smelling	Moderate

- communication in interpersonal interactions: skill and ability to identify and use appropriate both verbal and non-verbal behavior in a variety of situations;
- identify or use appropriate language for informational purposes, such as describe, ask for information, state needs, command, agree, or disagree, ask permission, etc.;
- identify or use appropriate language to influence or persuade, such as caution, request, advise, persuade, negotiate, etc.;
- identify or use appropriate language in general social situations such as to greet, introduce, thank, apologize, compliment, express pleasure or regret, etc.;
- identify or use appropriate group behavior;
- clarify or request information;
- communication regarding personal information:
 - respond appropriately to common personal information questions; complete a personal information form;

- interpret or write a personal note, invitation, or letter;
- converse about daily and leisure activities and personal interests.

VISION:

	EXPECTED LEVEL
Near acuity – 20" or less	Moderate to High
Far acuity – 20' or more	Moderate to High
Depth perception – three dimensional	Moderate to High
Accommodation – focus adjustment	Moderate to High
Color vision	Moderate to High
Field of vision – vision range	Moderate to High

TYPICAL ENVIRONMENTAL CONDITIONS:

The following is the usual range of work environment characteristics a worker is likely to encounter in a variety of work activities in this vocational domain.

	EXPECTED OCCURENCES
General weather conditions	Low to Moderate
Cold	Low to Moderate
Hot	Low to Moderate
Wet/humid conditions	Low to moderate
Noise levels	Moderate to high
Vibration	Low to Moderate
Atmospheric pressure	Low
Moving, mechanical parts	Low to Moderate
Electrical shock hazard	Low
High, exposed places	Low
Radiation hazard	Low
Explosives hazard	Low
Toxic caustic chemical hazard	Low
Other adverse conditions	Low to Moderate

OTHER SPECIFIC OCCUPATIONS SUITABLE FOR THIS PROFILE TYPE:

SALES TECHNOLOGY: Buyer, Commission Agent, Comparison Shopper, Pawnbroker, Pharmaceutical Detailer, Sales Agent, Sales Representative.

GENERAL SALES: Auctioneer, Building Consultant, Demonstrator, Manufacturer's Representative, Sales Agent, Salesperson, Sales Representative, Superintendent (Sales), Telephone Solicitor, Travel Agent, Retail Clerk.

VENDING: Distributor, Vendor.

EMPLOYABILITY DETERRENTS

JOB STABILITY: Below Par
WORK ETHICS: Average
WORK CONSISTENCY: Good
SITUATIONAL CONTROL: Below Par
WORK ENVIRONMENT RESILIENCE: Low
GENERAL CONDUCT: Below Par
INTERPERSONAL BEHAVIOR: Marginal
LOCUS OF CONTROL: External
EMOTIONAL STABILITY: Marginal
SUBSTANCE USE: Indicated
LEGAL INVOLVEMENTS: Indicated

CRITICAL ITEMS

- True - My moods often go up and down.
- False - Repetitive jobs do not bother me.
- False - I usually keep the same job at least five years.
- True - I do not like my authority challenged at work, nor in my personal life.
- True - I had a few confrontations with coworkers.
- True - I seldom expect things to go right.
- True - I resigned once instead of getting fired.
- True - When the job becomes too boring, it is time for me to move on.
- True - People always expect too much from me.
- True - I pursued many different careers in my life.
- True - I had many dead end jobs.
- True - I quit a job several times without a notice.
- True - Being polite toward angry people means giving to them.
- True - Ends justify the means.
- False - If I do not have an immediate answer, I always call a person back when I do.
- False - I never had conflicts with coworkers.
- False - I am willing to work without benefits.
- True - Time spent with a customer on the phone should never exceed 10 minutes.
- True - It is my life and I do what I want.
- True - I am right most of the time.
- True - Low level jobs are only stepping stones for something better.
- True - I am OK when people leave me alone.
- True - My moods are a problem at times.
- True - Most things are beyond my control.
- True - I do not tolerate dull and boring jobs for very long.
- False - I have a history of steady and successful employment.
- True - I prefer not to deal with angry and rude customers.
- False - I have never offended my supervisors.
- True - I get easily distracted when people are talking around me.
- True - When I am upset, I cannot concentrate very well.
- True - Sometimes I make decisions too quickly.
- True - At times, my temper gets out of control.
- False - I have never tried, experimented with, or used cocaine.
- True - I avoid unpleasant situations at all costs.
- False - I do not have a criminal record.