



SUCCESS INSIGHTS®

Management-Staff Version

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

Jane Smith

Customer Service

Sample Ltd.

25/9/2009



"Developing Dynamic Communication Skills"

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INTRODUCTION

Behavioural 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.

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



GENERAL CHARACTERISTICS

Based on Jane's responses, the report has selected general statements to provide a broad understanding of her work style. These statements identify the basic natural behaviour that she brings to the job. That is, if left on her own, these statements identify HOW SHE WOULD CHOOSE TO DO THE JOB. Use the general characteristics to gain a better understanding of Jane's natural behaviour.

Jane has a need to achieve in an environment in which the quality is controlled. She can become frustrated when put in a situation that is nothing more than a rambling discussion. When Jane sees something that is wrong she wants to fix it. She is oriented toward achieving practical results. She may be overly sensitive to criticism of her work. If you do comment on her work you had better be right, since she may not take criticism lightly. To some people, Jane may appear to be analytical. Jane keeps her equipment in good working order and likes others who also use the equipment to share the same concern. She judges others by the quality of their work. She has such high personal standards that she expects others to have the same dedication. She is a real stickler for quality and systems; to insure quality. Her motto for work may well be the coined phrase, "quality is job number one." Getting the project or job done right is important to her. If forced to choose between producing quality work or quantities of work, quality will be the winner. Jane prefers that things be orderly and she will approach work in a systematic manner. She likes to work behind the scene and be seen as someone who is organized and has her life in order.

Jane sees herself as factual, and "down-to-earth." She is more than casually interested in "theory." When confronted with a problem she will look for a method, a formula, a procedure or a system to solve it. She is good at analysing situations that can be felt, touched, seen, heard, personally observed or experienced. Her motto is,



GENERAL CHARACTERISTICS

"facts are facts." She is the type of person who will accept challenges, and accept them seriously. She is skilled at observing and collecting data on different subjects. If she has a real passion for a given subject, she will read and listen to all the available information on the subject. Jane usually judges others by the quality of their work. She may find it difficult to recognize others' strengths, if their work does not meet her high standards. She tends to become bogged down in details. She may accumulate so much data that the details overwhelm her. She is a critical and systematic thinker, and this strength may not be easily recognized by others. She prefers to study and analyze a problem before responding. She wants to feel that her response is the correct one.

Jane is intuitive and is able to ask good questions in order to get the critical, complete information she seeks. People who show up early or late for appointments may upset her, since her work plans are disrupted. Jane makes an agenda and prefers that others not change it. She enjoys analysing the motives of others. This allows her to develop her intuitive skills. She likes to know what is expected of her in a working relationship, and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues. Because Jane wants to be certain she is performing her work assignments correctly, she enjoys working for a manager who explains what is expected of her. Jane's logical, methodical way of gathering data is demonstrated by her ability to ask the right questions at the right time. She has a low trust level with strangers. This becomes apparent when she asks specific and perhaps blunt questions. When Jane is deeply involved in thinking through a project, she may appear to be cool and distant.



VALUE TO THE ORGANIZATION

This section of the report identifies the specific talents and behaviour Jane 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.

- Always concerned about quality work.
- Accurate and intuitive.
- Presents the facts without emotion.
- Comprehensive in problem solving.
- Always looking for logical solutions.
- Excellent troubleshooter.
- Suspicious of people with shallow ideas.



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 Jane. 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 Jane most frequently.

Do:

- Keep at least three feet away from her.
- Give her time to be thorough, when appropriate.
- Make an organized presentation of your position, if you disagree.
- Make an organized contribution to her efforts, present specifics and do what you say you can do.
- Respect her quiet demeanour.
- Be prepared with the facts and figures.
- Use expert testimonials.
- Listen to her.
- Draw up a scheduled approach to implementing action with a step-by-step timetable; assure her that there will not be surprises.
- Provide details in writing.
- Give her time to verify reliability of your actions; be accurate, realistic.
- Have the facts in logical order.
- Prepare your "case" in advance.



INEFFECTIVE COMMUNICATION

This section of the report is a list of things NOT to do while communicating with Jane. Review each statement with Jane 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.

Do not:

- Push too hard, or be unrealistic with deadlines.
- Provide special, personal incentives.
- Use testimonies of unreliable sources; do not be haphazard.
- Use gimmicks or clever, quick manipulations.
- Use inappropriate buzz words.
- Dillydally, or waste time.
- Leave things open to interpretation.
- Be vague about what is expected of either of you; do not fail to follow through.
- Leave things to chance or luck.
- Touch her body when talking to her.
- Use high speed, intense inputs.
- Be superficial.
- Say "trust me"--you must prove it.



COMMUNICATION TIPS

This section provides suggestions on methods which will improve Jane's communications with others. The tips include a brief description of typical people with whom she may interact. By adapting to the communication style desired by other people, Jane 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 communicator.

<p>When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:</p> <ul style="list-style-type: none"> ■ Prepare your "case" in advance. ■ Stick to business. ■ Be accurate and realistic. <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> ■ Being giddy, casual, informal, loud. ■ Pushing too hard or being unrealistic with deadlines. ■ Being disorganized or messy. 	<p>When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:</p> <ul style="list-style-type: none"> ■ Be clear, specific, brief and to the point. ■ Stick to business. ■ Be prepared with support material in a well-organized "package." <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> ■ Talking about things that are not relevant to the issue. ■ Leaving loopholes or cloudy issues. ■ Appearing disorganized.
<p>When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:</p> <ul style="list-style-type: none"> ■ Begin with a personal comment--break the ice. ■ Present your case softly, nonthreateningly. ■ Ask "how?" questions to draw their opinions. <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> ■ Rushing headlong into business. ■ Being domineering or demanding. ■ Forcing them to respond quickly to your objectives. 	<p>When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:</p> <ul style="list-style-type: none"> ■ Provide a warm and friendly environment. ■ Do not deal with a lot of details (put them in writing). ■ Ask "feeling" questions to draw their opinions or comments. <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> ■ 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 Jane'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 behaviour and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that Jane enjoys and also those that create frustration.

- An environment dictated by logic rather than emotion.
- Data to analyze.
- Private office or work area.
- Close relationship with a small group of associates.
- Projects that produce tangible results.
- Environment where she can be a part of the team, but removed from office politics.
- An environment where she can use her intuitive thinking skills.



PERCEPTIONS

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

"See Yourself As Others See You"

SELF-PERCEPTION

Jane 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 Jane's responses, the report has marked those words that describe her personal behaviour. 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 STYLE

Jane's natural style of dealing with problems, people, pace of events and procedures may not always fit what the environment needs. This section will provide valuable information related to stress and the pressure to adapt to the environment.

Natural	PROBLEMS - CHALLENGES	Adapted
<p>Jane is quite inquisitive and wants to be seen as an outwardly competitive person who is adventuresome by nature. She is results-oriented and likes to be innovative in her approach to problem solving. Jane is not necessarily confrontational by nature, but if a problem does exist she will not turn down the opportunity for confrontation.</p>	<p>Jane sees a need to be more aggressive in her approach to dealing with problems and challenges. This is illustrated by a demanding approach to solving problems. She is seeking authority equal to the challenge.</p>	

Natural	PEOPLE - CONTACTS	Adapted
<p>Jane 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.</p>	<p>Jane sees no need to change her approach to influencing others to her way of thinking. She sees her natural style to be what the environment is calling for.</p>	



NATURAL AND ADAPTED STYLE

Natural	PACE - CONSISTENCY	Adapted
<p>Jane is deliberate and steady. She is willing to change, if the new direction is meaningful and consistent with the past. She will resist change for change's sake.</p>	<p>Jane seeks a wide scope of activities in an environment that is constantly changing. Timetables, deadlines and schedules can be constantly shuffled without obvious consternation. Even electronic communication may not move fast enough for her.</p>	

Natural	PROCEDURES - CONSTRAINTS	Adapted
<p>Jane is concerned with doing things right. She can be quite worrisome and possibly fearful that mistakes will crop into the procedure. She will follow rules and procedures to the letter and feels comfortable in a situation in which exact standards and written procedures are the rule of the day.</p>	<p>Jane shows little discomfort when comparing her basic (natural) style to her response to the environment (adapted) style. The difference is not significant and Jane sees little or no need to change her response to the environment.</p>	



ADAPTED STYLE

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

- Careful, thoughtful approach to decision making.
- Traditional, quality-oriented work model to follow.
- Maintaining a clean and organized work station.
- Calculation of risks before taking action.
- Precise, analytical approach to work tasks.
- Limited contact with people.
- Acting without precedent, and able to respond to change in daily work.
- Persistence in job completion.
- Anticipating and solving problems.
- Sensitivity to existing rules and regulations.
- Dealing with a wide variety of work activities.
- Critical appraisal of data.



KEYS TO MOTIVATING

This section of the report was produced by analysing Jane'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 Jane and highlight those that are present "wants."

Jane wants:

- Prestige, position and titles so she can control the destiny of others.
- Opportunity to verbalize her ideas and demonstrate her skills.
- To be part of a quality-oriented work group.
- To explore new ideas and authority to test her findings.
- Sincere appreciation for achievements--may interpret as manipulation if overdone.
- Control of her own destiny.
- Freedom from restrictive controls.
- To be seen as a leader.
- Freedom from controls that restrict her creativity.
- To know the agenda for the meeting.
- Opportunity to discuss progress on major or new projects.
- Authority to install systems to achieve results.
- Meetings that stay on the agenda, or reasons for changing the agenda.



KEYS TO MANAGING

In this section are some needs which must be met in order for Jane 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 Jane and identify 3 or 4 statements that are most important to her. This allows Jane to participate in forming her own personal management plan.

Jane needs:

- To soften the edge and not be so blunt.
- Support in making high-risk decisions.
- Time to warm up to people.
- Sincerity from people with whom she works.
- Time to gather the facts and data.
- Sincere feedback from others.
- Performance appraisals on a regular basis.
- Rewards in terms of fine things--not just shallow words.
- Recognition for what she accomplished.
- A manager who prefers quality over quantity.
- Time to see and test if the plan will work.



AREAS FOR IMPROVEMENT

In this area is a listing of possible limitations without regard to a specific job. Review with Jane 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.

Jane has a tendency to:

- Tell ideas as opposed to sell ideas.
- Be suspicious and pessimistic of any new project. Wants more support than is necessary.
- Be defensive when threatened and use the errors and mistakes of others to defend her position.
- Be critical of any approach that is not regarded as purely logical or factual (to her standards).
- Hesitate to act without precedent.
- Appear somewhat aloof and cool to the emotional appeal of others.
- Have difficulty making decisions because she is mostly concerned about the "right" decision. If precedent does not give direction, her tendency is to wait for directions.



ACTION PLAN

The following are examples of areas in which Jane 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"/> Communicating (Listening) | <input type="checkbox"/> Time Management |
| <input type="checkbox"/> Delegating | <input type="checkbox"/> Career Goals |
| <input type="checkbox"/> Decision Making | <input type="checkbox"/> Personal Goals |
| <input type="checkbox"/> Disciplining | <input type="checkbox"/> Motivating Others |
| <input type="checkbox"/> Evaluating Performance | <input type="checkbox"/> Developing People |
| <input type="checkbox"/> Education | <input type="checkbox"/> Family |

Area: _____

- 1.
- 2.
- 3.

Area: _____

- 1.
- 2.
- 3.

Area: _____

- 1.
- 2.
- 3.

Date to Begin: _____ Date to Review: _____



BEHAVIORAL FACTOR INDICATOR™

Management Version

Jane Smith

Customer Service

Sample Ltd.

25/9/2009

"Developing Dynamic Communication Skills"

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INTRODUCTION

Classifying management behaviour is not an easy undertaking, largely because there are so many variables on which classifications could be based. The classifications in this report are purely behavioural. Behavioural measurement can be classified as how a person will do a job. No consideration has been given to age, experience, training or values.

Your report will graphically display your behavioural skills in 12 specific factors. Each factor was carefully selected allowing anyone to be successful if they meet the behavioural demands of the job.

The Natural graph represents your natural behaviour - the behaviour you bring to the job. The Adapted graph measures your response to the environment - the behaviour you think is necessary to succeed at a job. If your Adapted graph is significantly different from your Natural, you are under pressure to change or "mask" your behaviour.

Read and compare your graphs. Look at each factor and the importance of that factor to the successful performance of your job. Your Adapted graph will identify the factors you see as important and shows you where you are focusing your energy.

Knowledge of your behaviour will allow you to develop strategies to win in any environment you choose.



SPECIFIC FACTOR ANALYSIS

DECISIVENESS/RESULTS ORIENTED

0...1...2...3...4...5...6...7...8...9...10



SENSE OF URGENCY

0...1...2...3...4...5...6...7...8...9...10



VISION FOR THE FUTURE

0...1...2...3...4...5...6...7...8...9...10



MOTIVATING OTHERS

0...1...2...3...4...5...6...7...8...9...10



SELF-CONFIDENCE

0...1...2...3...4...5...6...7...8...9...10



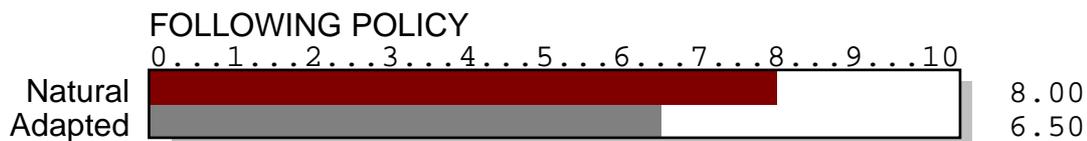
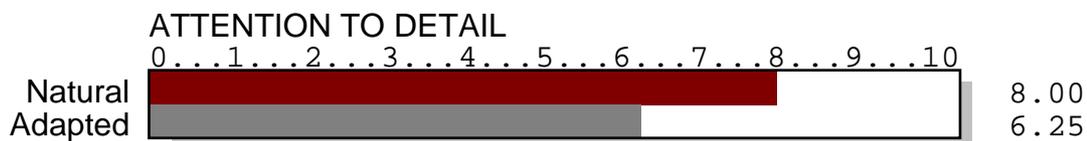
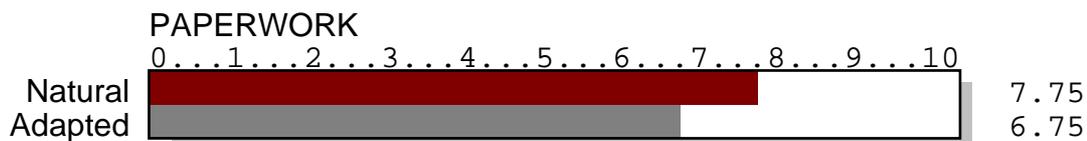
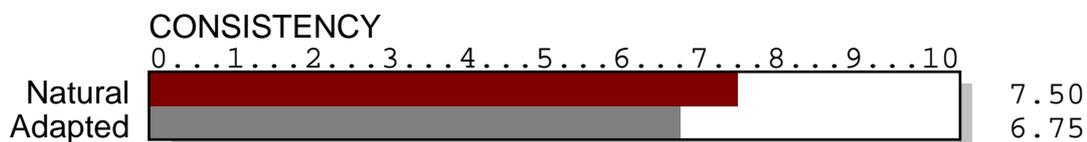
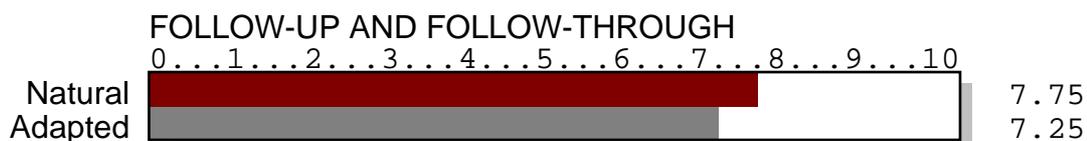
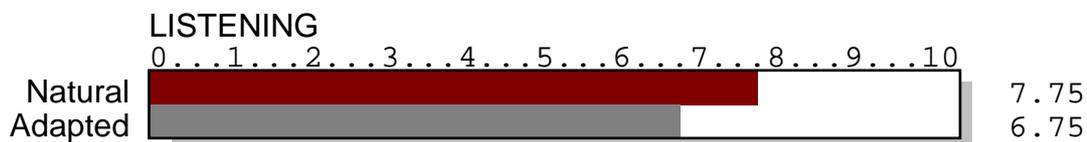
CUSTOMER/EMPLOYEE INTERFACE

0...1...2...3...4...5...6...7...8...9...10





SPECIFIC FACTOR ANALYSIS





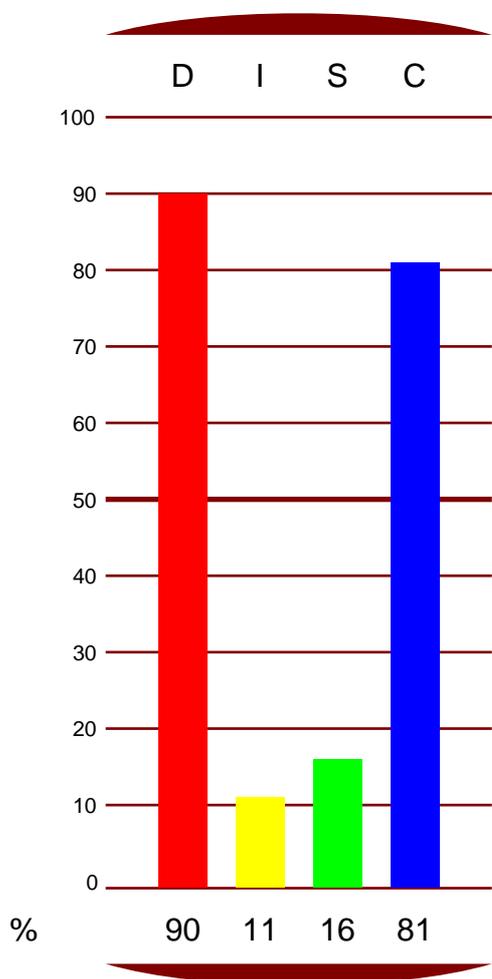
STYLE INSIGHTS® GRAPHS

Jane Smith

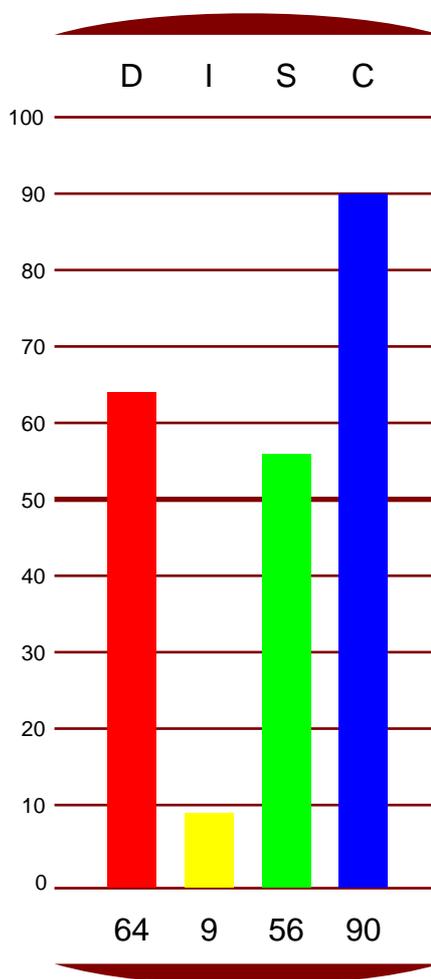
Sample Ltd.

25/9/2009

MOST
Graph I
Adapted Style



LEAST
Graph II
Natural Style



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 behavioural style, the Wheel adds a visual representation that allows you to:

- View your natural behavioural style (circle).
- View your adapted behavioural style (star).
- Note the degree you are adapting your behaviour.
- If you filled out the Work Environment Analysis, view the relationship of your behaviour 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 behaviour. The further the two plotting points are from each other, the more you are adapting your behaviour.

If you are part of a group or team who also took the behavioural 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.

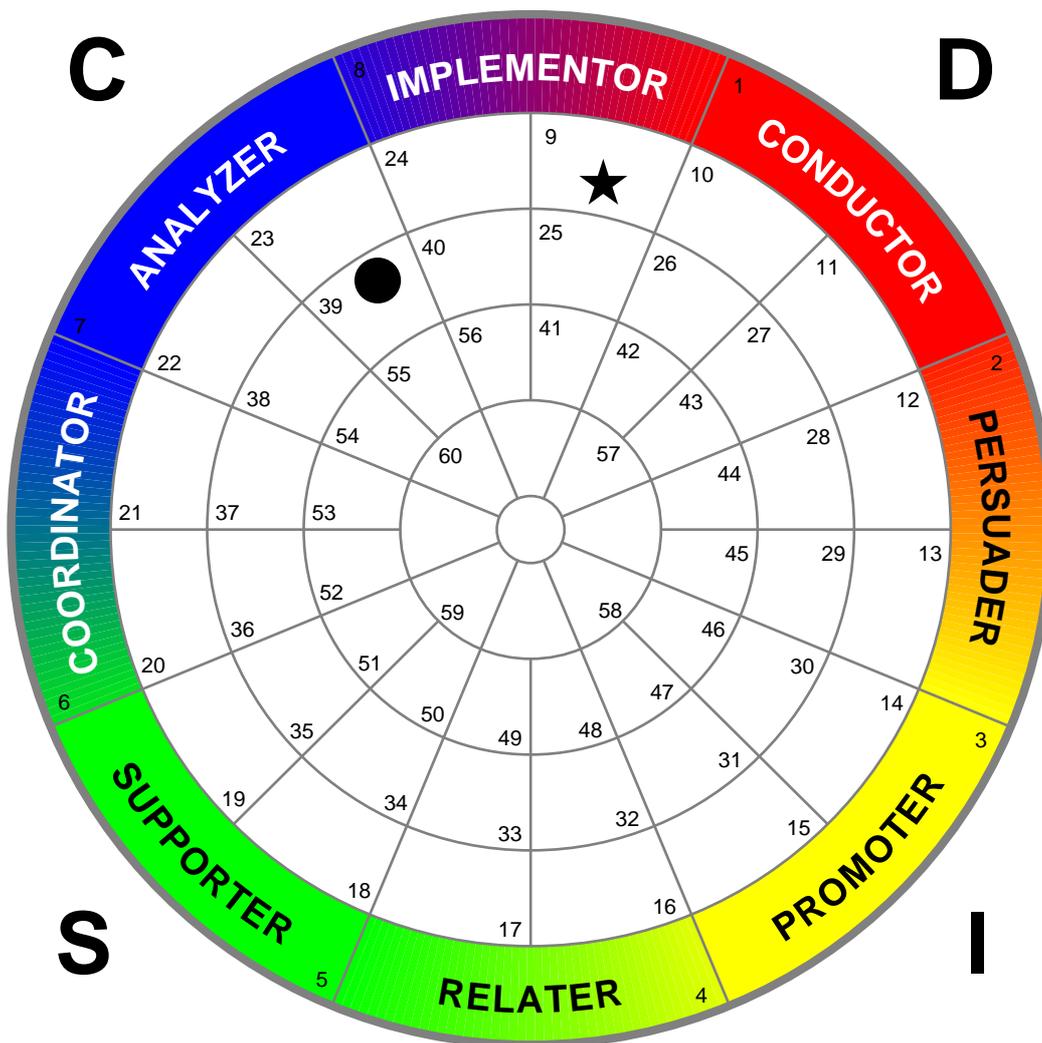


THE SUCCESS INSIGHTS® WHEEL

Jane Smith

Sample Ltd.

25/9/2009



Adapted: ★ (9) CONDUCTING IMPLEMENTOR

Natural: ● (39) IMPLEMENTING ANALYZER (FLEXIBLE)

Norm 2003

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