

**Confidential Report For
Chris Smith**

Featuring

- Career Profile+

Test Version: Career Profile+
Test ID 1447

For Chris Smith

Date Test Completed:

Making an Effective Selection Decision

A hiring manager's most critical responsibility is making the right selection decisions for his or her office. From decades of research and experience, LIMRA knows that, to make an effective selection decision, you need to be able to answer the following questions:

- Can the candidate do the job?
- Will the candidate do the job?
- Does the candidate fit in your specific field office?

The Career Profile+ helps, in part, answer these questions — and the information on the following pages is presented in a way that will guide you in addressing them.

Can the Candidate Do the Job?

This section indicates how well a candidate's recent background aligns with the backgrounds of those who have succeeded or failed in the industry. From this perspective, it helps you answer the question "Can the candidate do the job?" If you choose to proceed with the candidate, ensure that you review the rest of this report. It provides valuable information on how the candidate will apply his or her potential and work within your environment.

Career Profile+ Rating: 18

Probability of Success

Across all Career Profile+ users in financial services companies in the United States, approximately 32 out of 100 candidates who rate 18 are expected to be successful. Compared with the average financial services candidate in the United States, this candidate has a 80 percent better than average chance of being a successful producer.

A "successful" financial services sales representative is one who

1. survives his or her first contract year, and
2. produces in the top half of all first-year surviving producers in the company.



For Chris Smith

Date Test Completed:

Survival and Productivity

The Career Profile+ rating is a combination of two predictors: first-year survival and first-year production. The chart below shows how this candidate rated in these two areas, and provides a clear picture of where the "risk" lies with the candidate, should he or she join your team.

	Below-Average Production	Average Production	Above-Average Production
Below-Average Survival			
Average Survival			
Above-Average Survival			

In other words, compared with an average candidate:

- This candidate has an above-average chance of surviving his or her first contract year.
- This candidate has an average chance of being among the top producers in your company.

Likelihood of Acceptance

It is very likely that this candidate will accept a position if you offer it.

This information does not affect the candidate's score, but is intended to alert you if certain candidates may be hesitant to accept your opportunity.

For Chris Smith

Date Test Completed:

Will the Candidate Do the Job?

The following section focuses on personality characteristics related to success in a financial services sales career — and how they are likely to impact the candidate's performance of the job. In general, the higher the score for each personality characteristic, the more likely the candidate will succeed in the career.

For each personality characteristic, this report shows

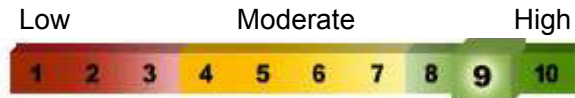
- a definition of the characteristic
- the candidate's score
- general qualities frequently observed in people with this score
- likely sales behaviors
- a summary
- coaching tips
- suggested interview questions

Please note that the information on Personality Characteristics does NOT impact the overall Career Profile+ rating. This section is provided for use throughout your selection process and for planning for follow-up interviews, should you choose to proceed with this candidate.

For Chris Smith
Date Test Completed:

Persuasiveness

Persuasiveness addresses being effective at changing the opinions or perspectives of others, including persuading others with convincing arguments, effectively selling ideas, convincing and influencing others, and liking to sell and negotiate.



Candidates who score High in Persuasiveness:

General Qualities

- Influence people without pressuring them
- Enjoy trying to talk people into things
- Enjoy arguments where they try to persuade others
- Have a natural talent for influencing people

Sales Behaviors

- Are good at selling
- Are comfortable doing business in social situations
- Work best when given freedom to choose their own approach
- Will not back down when their point of view is challenged
- Accept constructive criticism from their manager
- Use personal charm or charisma to get what they want

Summary

This candidate will most likely be able to effectively tailor presentations to meet the needs of whatever audience he or she is presenting to. This candidate will likely make use of effective planning, diagnosing, presenting, and closing, and enjoys persuading others to align with his or her perspectives. This candidate generally enjoys the challenges presented by skeptical audiences and is often successful at converting even the most difficult prospects.

Coaching Tips

Candidates who score high in persuasiveness generally enjoy persuading others to their point of view, but may run the risk of pressuring people to buy or stretching the truth to get a sale. Provide venues that allow the candidate to exercise his or her natural persuasion skills. Allow the candidate the independence to use the presentation skills he or she brings to the table, as long as he or she remains in compliance.



For Chris Smith

Date Test Completed:

Interview Guide: Persuasiveness

Tell me about the last time you were in a position to recommend a course of action to someone who wasn't sure what to do. Did the person follow your recommendation?

Tell me about a time when you convinced someone to do a special favor for you, even though he or she was at first unwilling. What did you say that changed his or her mind?

For Chris Smith
Date Test Completed:

Energy

Energy addresses working quickly and energetically, working effectively in a fast-paced environment, and sustaining a high level of energy over time.



Candidates who score High in Energy:

General Qualities

- Work quickly and energetically
- Tend to do things rapidly, even when there is plenty of time
- Enjoy working in a fast-paced environment
- Feel restless when they are not keeping busy
- Enjoy work where they have to handle many competing demands at once

Sales Behaviors

- Manage time efficiently
- Make decisions quickly
- Make good use of office staff by delegating appropriately
- Learn complex new material quickly
- Increase effort levels for sales contests

Summary

This candidate is likely to use all of his or her available resources effectively and is best suited to an environment that continually offers challenging and fast-paced workloads. This candidate is likely to integrate information from many sources, will respond positively to an environment full of similar people, and may become frustrated if forced to work with others who do not share his or her fast-paced orientation. This candidate is likely to actively prospect and displays enthusiastic energy when proposing products and closing presentations.

Coaching Tips

Generally speaking, candidates with high energy can succeed in sales and perform best when they are guided to use their natural liveliness as suggested by the following coaching tips: Limit the use of unnecessary restrictions on the way they use their time. Assign a wide variety of tasks/cases with increasingly challenging deadlines.



For Chris Smith

Date Test Completed:

Interview Guide: Energy

Tell me about a time when you had to work quickly to get something accomplished. How did you feel about working under pressure?

In most work and school situations, there are "peaks" and "valleys" . In other words, sometimes you are much busier than at other times. Think about a time when you experienced a slow period. How did you handle it?

For Chris Smith

Date Test Completed:

Achievement Drive

Achievement Drive addresses setting challenging personal goals, striving to exceed existing standards of performance, and striving to improve performance.



Candidates who score High in Achievement Drive:

General Qualities

- Like to measure their performance against challenging goals
- Strive to exceed existing standards of performance
- Are often thinking about how to improve their own or the group's performance
- Often try to find better, faster or more efficient ways of doing things

Sales Behaviors

- Set higher goals for themselves than their manager does
- Enjoy prospecting and do it enthusiastically
- Adapt quickly to changing schedules or priorities
- Continue to push on after formal goals are met

Summary

This candidate is very likely to set challenging personal goals and follow through using all available resources to make sure goals are met. This candidate may prefer to work independently, although he or she will probably not hesitate to solicit assistance from others if it will help in reaching goals. He or she is likely to respond favorably to challenges that present a clear "winner" and may be frustrated in environments that don't offer competition and demanding targets. This candidate will probably be driven to identify and make convincing sales presentations to qualified prospects and will usually conduct the necessary steps to ensure success, such as developing a proposal based on thorough needs analyses.

Coaching Tips

Generally speaking, candidates who score high on achievement drive can succeed in sales if other critical competencies are present. They perform best when provided with the freedom to pursue their goals. The following items should be considered if you continue with the candidate: Adopt a hands-off approach to goal setting, as this candidate will likely set challenging personal goals. Make sure the candidate has the necessary resources to succeed at a high level.



For Chris Smith

Date Test Completed:

Interview Guide: Achievement Drive

Different people work best under different circumstances. Give me an example of a time when you did not perform well and explain why you think this happened. What was it about this situation that contributed to your poor performance?

Tell me about a time when you decided to improve your level of performance — for example, in school, on a sports team, or on the job. Did you reach your desired level of performance?

For Chris Smith

Date Test Completed:

Initiative and Persistence

Initiative and Persistence address being willing to take on responsibilities and challenges, persisting at overcoming obstacles, and being willing to put in extra effort to complete things.



Candidates who score High in Initiative and Persistence:

General Qualities

- Have a strong commitment to getting things completed
- Seek out opportunities to take on new responsibilities
- Are willing to work longer and harder on a project than most people
- Will work extra hours to complete things
- Push themselves to the limits of their ability

Sales Behaviors

- Bounce back easily from rejection
- Persist in attempting to close when faced with objections
- Are quick to pick up the phone to ask for an appointment
- Work independently — do not require a lot of their manager's time
- Provide responsive customer service

Summary

This candidate will often act proactively to achieve whatever goals are set for him or her, regardless of the obstacles that act as a barrier to progress. This candidate may view setbacks as temporary instances and is not likely to be derailed by objections. This candidate will likely strive to exhibit excellent customer service and production by taking the initiative to set personally challenging goals and working to meet them.

Coaching Tips

Generally speaking, candidates with high initiative and persistence can succeed in sales positions. The following should be taken into consideration if you proceed with this candidate: Empower the candidate to set personal objectives, as he or she may resent unnecessary restrictions. Allow the candidate to be somewhat flexible regarding selling style, even if it is different from conventional approaches. Do not over-script him or her.



For Chris Smith

Date Test Completed:

Interview Guide: Initiative and Persistence

Some difficult problems can seem impossible to solve. Tell me about a situation in which you tried to solve a problem but had to give up. How did that make you feel?

When was the last time that you took the initiative to introduce yourself to someone you had never met before? Why did you do this? Did you feel comfortable doing it?

For Chris Smith

Date Test Completed:

Does the Candidate Fit in Your Office?

The following section should help in the understanding of key candidate characteristics and achieving optimum candidate-organization fit. It focuses on the candidate's:

- Motivators
- Concerns
- Expectations
- Work Styles
- Team Preferences

Please note that the information in this section does NOT impact the overall Career Profile+ rating. This section is provided for use throughout your selection process and for planning for follow-up interviews, should you choose to proceed with this candidate.

For Chris Smith

Date Test Completed:

Motivators

Motivators do NOT impact the overall CP+ rating.

The charts below show how the candidate rated each of the following motivators. You may want to use this information to keep candidates engaged in your recruiting efforts as well as for ongoing motivation with individuals you hire.

Outcomes Associated With Sales Careers

	Not Important	Somewhat Important	Important	Very Important	Extremely Important
Independence					
Recognition					
Prestige					
Money					
Continuous Learning					
Positive Impact on the Community					
Leisure Time					
Work/Family Balance					

The candidate's responses indicate:

He or she is highly motivated by tangible rewards that are easily measured and comparable across individuals. This candidate tends to value public recognition and rewards symbolic of achievement, and enjoys situations where there is a clear "winner." He or she is focused primarily on personal and professional growth, and may not perceive a need to obtain positions of authority to feel professionally accomplished. He or she greatly values time spent on non-work activities with family or friends.

Additional Outcomes Often Associated With Management Careers

	Not Important	Somewhat Important	Important	Very Important	Extremely Important
High Activity Level					
Influence					
Creativity					
Security					
Control Over Decisions					
Advancement					

The candidate's responses indicate:

This candidate is motivated at high levels by three of the six outcomes typically associated with a sales management career. This indicates a moderate fit between this candidate's goals and the outcomes typically provided by a sales management career. This information may be relevant to the candidate's eventual career path and professional development, if he or she joins your organization.

For Chris Smith

Date Test Completed:

Interview Guide: Motivators

Use interview questions such as those provided here to discuss further with the candidate which motivators are most important to him or her, and how those goals might be realized in a financial services sales career. Also, when there are clear matches with your organization, use this as a way to continuously engage the candidate in the selection process. We recommend that you take notes as the candidate responds to your questions.

"You have indicated these motivators are very or extremely important to you..."

What does (this) mean to you?

Why is this important to you?

How would you hope to achieve this if you obtained this position?

For Chris Smith

Date Test Completed:

Concerns

Concerns do NOT impact the overall CP+ rating.

The chart below shows how the candidate rated each of the following concerns about the position.

	It will be hard for me to handle this	I am not sure whether I can handle this	I can probably handle this	I am sure that I can handle this
Finding enough prospective clients				
Using my own money for business expenses				
Meeting expectations of management				
Being accepted as a trusted advisor by clients				
Being able to use the latest technology				
Being able to accept rejection from potential clients				
Working long hours				
Keeping current with industry knowledge				
Mixing business with pleasure at social events				
Approaching people I know for business purposes				
Selling enough to make the income I need				
Answering in-depth questions about complex financial products				
Performing well enough to meet my own standards				
Having enough time for friends and family				

The candidate's responses indicate:

This candidate states that he or she is mostly confident meeting the personal, technical, and sales aspects of the position. However, it is unlikely a candidate will have no concerns regarding a new sales position, and it is highly recommended to get a better understanding of the candidate's concerns if he or she progresses through the selection process.

In presenting the career to this candidate, keep in mind the following:

As suggested above, to get a more realistic assessment of the candidate's concerns regarding the position, it will be necessary to address this area during the interview process.

For Chris Smith

Date Test Completed:

Interview Guide: Concerns

You may want to consider the key areas that are challenges in your particular office, and then focus on those areas in your discussions with the candidate. Also, these interview questions are suggested for concerns that the candidate rated as “not sure” or “hard to handle.” Note that you should still discuss the potential challenges of the position with the candidates who respond “I am sure that I can handle this” to every item.

Consider asking the candidate which issues he or she is most concerned about. Then ask the candidate the following questions for as many of the concerns as you feel are appropriate. We recommend that you take notes as the candidate responds to your questions.

"You have indicated you think it will be hard for you to handle some issues a financial services sales representative is likely to face..."

Why does this concern you?

Tell me about another time when you have had a problem with this.

Tell me why you think you will have a hard time with this now, if you obtain this position.

Tell me how you might change this from a problem to an asset.

For Chris Smith

Date Test Completed:

Expectations

Expectations do NOT impact the overall CP+ rating.

The chart below shows how the candidate responded to questions about his or her expectations of this position. It also shows what is characteristic of your office according to your Office Profile, if available.

	Candidate's Response	Office Profile
Number of evenings typically worked per week	3 evenings	5 evenings
Number of hours per week spent learning sales presentations and product information during first few weeks after licensing	21 to 25 hours	16 to 20 hours
Number of hours per week spent on the telephone for business purposes	21 to 25 hours	6 to 10 hours
Total number of hours worked per week	20 to 29 hours	60 hours or more
Money spent per week on out-of-pocket business expenses	\$100 to \$149	\$25 to \$49
Number of contacts needed to get one sales interview	10 to 14 people	30 or more people
Number of sales presentations needed to get one sale	20 to 24 presentations	7 to 9 presentations
Number of sales for a typical first-year producer in this office	10 to 19 sales	200 to 299 sales
Average income for a typical first-year producer in this office	\$40,000 to \$49,999	\$50,000 to \$99,999
Amount candidate expects to earn in his or her first year in this office	\$50,000 to \$99,999	N/A
Average income for a typical third-year producer in this office	\$50,000 to \$59,999	\$60,000 to \$69,999
Amount candidate expects to earn in his or her third year in this office	\$70,000 to \$79,999	N/A

Although the Office Profile is not directly related to the Career Profile+ rating, the candidate's expectations that are different from your Office Profile are shown above in bold type. It is important that the candidate clearly understands the expectations that are typical of your office. Candidates may leave the organization after a short period of time if they are contracted with an unrealistic picture of the work they will be expected to do.

Interview Guide: Expectations




If an Office Profile is available, you should review the expectations that differ noticeably between this candidate's responses and your office. It is recommended that you discuss each of these particular areas with the candidate to ensure that he or she has realistic expectations of the opportunity you have to offer.














For Chris Smith
Date Test Completed:

Work Styles

Work Styles do NOT impact the overall CP+ rating.

The chart below shows how the candidate responded to questions about his or her work preferences. It also shows what is characteristic of your office according to your Office Profile, if available.

Key		Represents the candidate's response
		Represents the Office Profile
		Represents agreement between the candidate and the Office Profile

	Not Important or Characteristic	Somewhat Important or Characteristic	Important or Characteristic	Very Important or Characteristic	Extremely Important or Characteristic
Working with a mentor is...					
Independence in setting own goals is...					
Working with minimal supervision is...					
Learning in formal training sessions is...					
Learning by observing others is...					
Working with colleagues in an office setting is...					
Being able to work from home is...					

It is important for this candidate to understand that significant differences in your organization's and his or her preferred work styles may result in less than optimal performance if not addressed.

Interview Guide: Work Styles

If an Office Profile is available, you should review the work styles that differ noticeably between this candidate's responses and your office. It is recommended that you discuss each of these particular areas with the candidate to ensure that he or she has realistic expectations of the opportunity you have to offer. Where there are clear matches, use this as a way to continuously engage the candidate in the selection process.

For Chris Smith
 Date Test Completed:

Team Preferences

Team Preferences do NOT impact the overall CP+ rating.

The chart below shows how the candidate responded to questions about his or her feelings on working in teams. If this is an important aspect of the financial services sales position in your organization, please review the responses and consider using the interview questions provided.

	Candidate's Response
Importance of working as part of a team	Important to me
Feelings about a job working closely with many other people	Very favorable
Preference for being a member of or the leader of a committee	I would much prefer to be the leader
Agreement that working with others on a project improves its final result	Strongly agree
Level of concern with the opinions of others	Somewhat

Interview Guide: Team Preferences

If financial services sales representatives within your organization will be expected to work as part of a team, consider asking the candidate interview questions such as those provided here.

“Working in a team environment presents a unique set of challenges and rewards...”

In your past experience, what aspect of working on a team have you found to be the most challenging? How did you handle this? What was the outcome?

In your past experience, what aspect of working on a team have you found to be the most rewarding? Why was that?

Describe your ideal work team (in terms of size, composition, structure, roles, etc.).

For Chris Smith

Date Test Completed:

Review Process

Now is the ideal time for you to stop and reflect on all of the information you have collected thus far on this candidate. This includes the Career Profile+ report and any other steps you have already taken (for example, an initial interview, application form, etc.).

This guide is designed to help you synthesize your thinking and develop objectives and questions for the in-depth interview, should you decide to continue with this candidate.

You should connect the following information on Motivators and Work Styles to what your opportunity has to offer to keep the candidate engaged in your selection process.

Remember that the following factors are very or extremely important to this candidate:

- Working on his or her own
- Having others respect him or her
- The personal income that he or she earns
- The opportunity to gain new skills and knowledge
- Knowing that the work he or she does helps others
- Having time away from work to use as he or she pleases
- The amount of time he or she has away from work to spend with family

The candidate's responses indicate a complete match with your organization in terms of the following preferred Work Styles:

- Learning by observing others is very important

As you look across the steps in your selection process so far, what specific themes or concerns would you like to discuss with this candidate?

If you continue with this candidate in your selection process, what objectives will you develop for the in-depth interview? What questions will you ask to explore these themes or concerns?



For Chris Smith
Date Test Completed: