

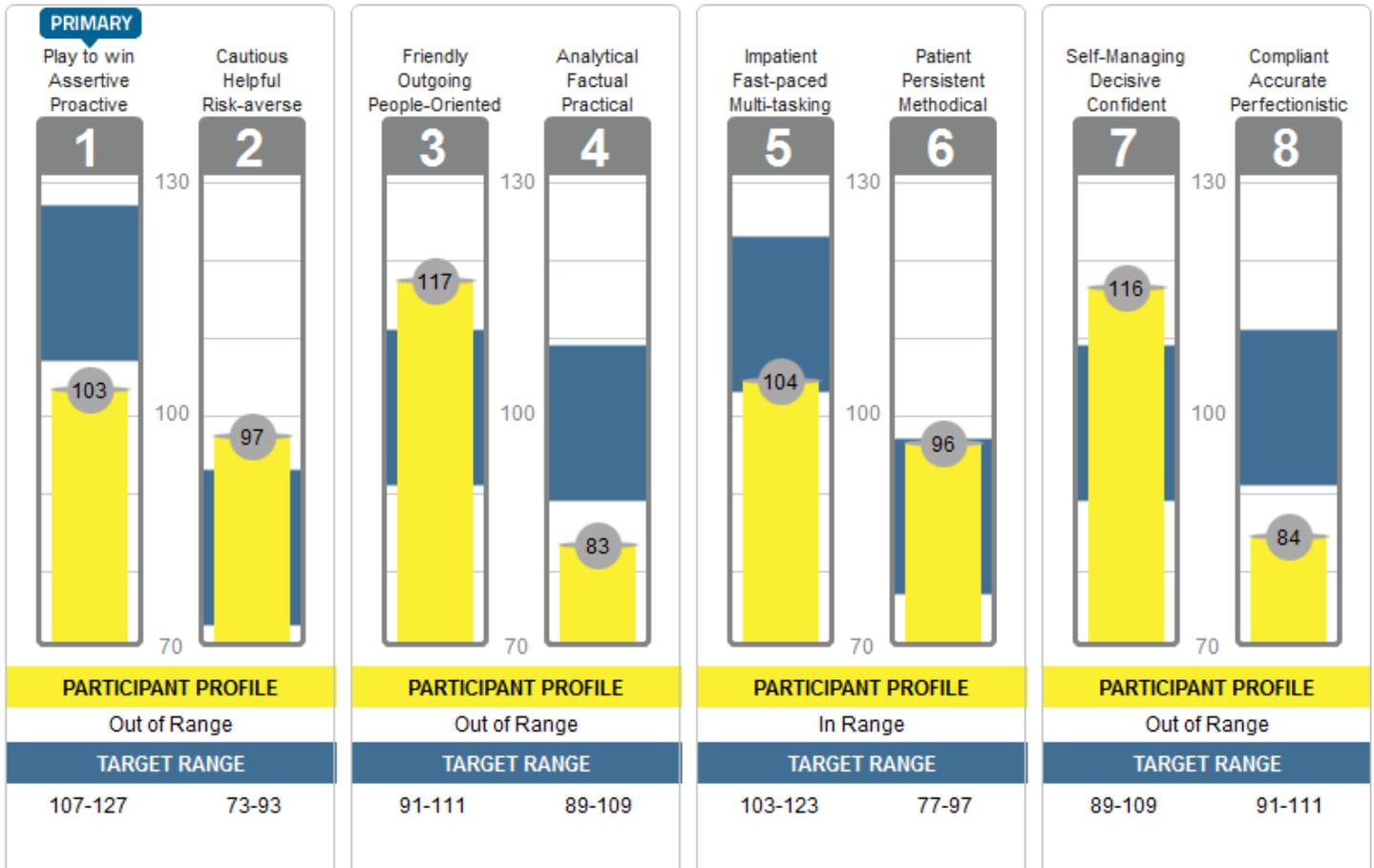
Client Name: **Omnia - Illustrative Sample**
 Client Number: **11-00-SAMPLES**

Participant Name: **Chris Sample**
 Job Target: **BMW Client Advisor (C)**
 Target Number: **203248**
 Profile Number: **909464WB**

Report Date: **March 03, 2014**
 Dept./Div.:
Compatibility Rating: Low
 Primary Behavioral Col. **1**

Rating Summary:

This participant scored Low against your target profile. A Low rating occurs when behavioral and/or performance measurements do not fall within your target range. A low also occurs when the primary behavioral column drops below the target range even if all other measurements are in range. Significant management concerns may exist; for more information see the "Comparison to Target" section.



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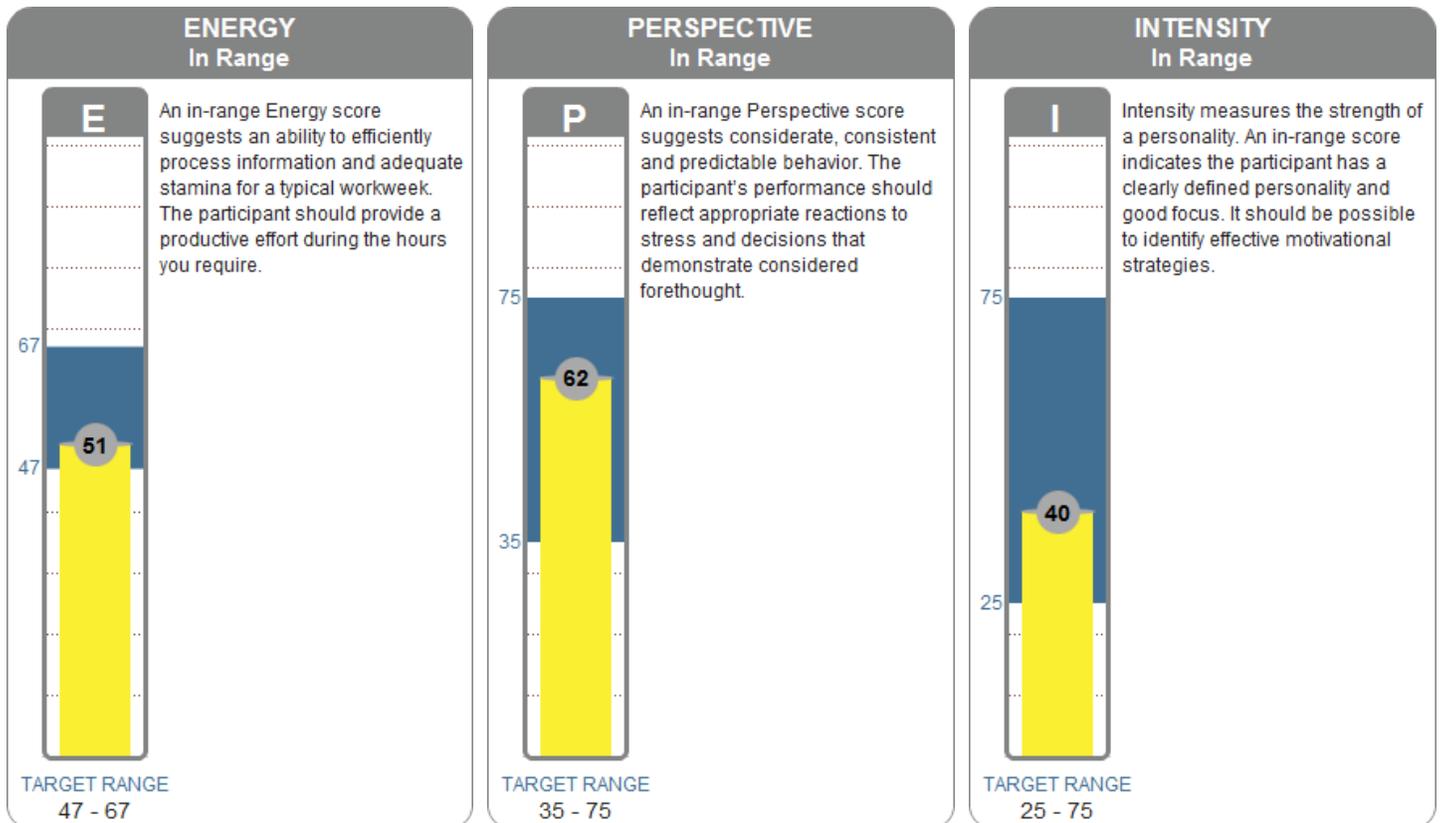
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COMPARISON TO TARGET



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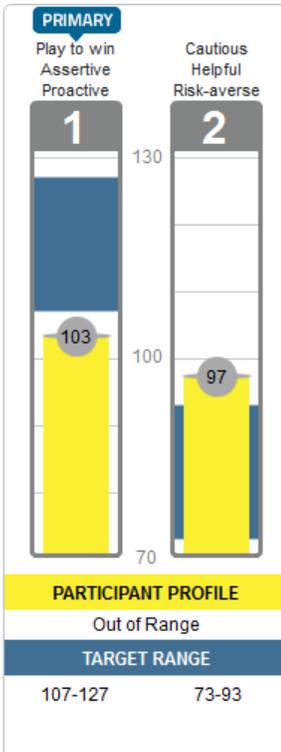
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COMPARISON TO TARGET



This person is more helpful and team-oriented but not as bold and assertive as your top client advisors.

Strengths: Helpful, supportive, service focused. Enjoys working toward group objectives and pleasing customers and management. Can collaborate effectively with other client advisors and dealership personnel.

Challenges: May focus more on ensuring customer satisfaction than maximizing profits. Not apt to be assertive or competitive; could be uncomfortable with the need to pressure customers to accept the terms of a deal. Might be too willing to compromise, even when a higher price might have been easily obtained. Might wait for customers to make their own decision about purchasing a unit, instead of urging them at every step. With an extremely high column 2, the individual may be very laid-back, reluctant to pressure customers, and easily taken advantage of in negotiations.

Action Plan: Coach on assertiveness. This person would benefit from being teamed with an experienced client advisor to hone negotiating skills. Could benefit your dealership more in a service capacity assisting customers rather than heavily involved in negotiations. The dependability of a steady salary could appeal to this candidate more than working on commission.



The individual is more socially oriented, expressive and outgoing, but not as practical or analytical as your top client advisors.

Strengths: Upbeat, persuasive, engaging, strong verbal communicator. Comfortable greeting customers on the lot and initiating conversation. Passionate when describing units and adept at offering emotional reasons why customers should commit to a sale. Can create a sense of excitement while reassuring customers they are making the right choice. Generating leads, securing referrals and networking in the community should be additional strengths.

Challenges: May be difficult for this individual to exude a serious, professional image. Could come across as the stereotypical smooth-talking car salesperson rather than a practical consultant for the discerning BMW customer. Listening could be a weakness; might dominate conversations and fail to identify buying signals. Could be excessively talkative and preoccupied with image.

Action Plan: Make sure this individual can discuss each unit in depth and offer specific facts to convince more skeptical customers to make a purchase. Coach on asking specific questions to identify customers' needs. Commend successes publicly, and motivate with status perks.

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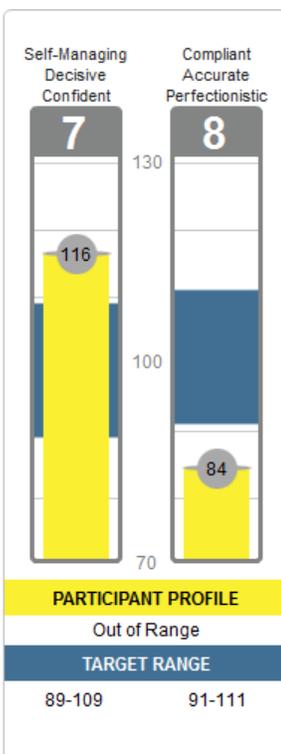
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COMPARISON TO TARGET



This participant falls within your target range for pace. Target Range: Column 5 is taller than column 6.

Column 5 is an indicator of versatility, a quick pace, and comfort multitasking. With a tall column 5, the client advisor is likely to work effectively in a fast-moving, time-sensitive environment. Should be comfortable juggling different customers simultaneously on busy days, and should have a sense of urgency about meeting customers' needs and getting deals closed quickly. Comfortable working under tight deadlines. Interruptions are not likely to faze this candidate; should be adaptable to changes and able to switch gears to accommodate new initiatives. Not inclined to rely on the same methods to get results, but should be quite willing to try new techniques and adapt new strategies for getting units punched.



This person is more independent and decisive, but not as cooperative or thorough as your top client advisors.

Strengths: Innovative, resilient, decisive and self-managing. Comfortable improvising. Does not need a great deal of hands-on guidance from a sales manager and should readily make decisions, even in unfamiliar situations. Should accept criticism and brush off sales rejections without getting discouraged.

Challenges: May not always take BMW or dealership policy into account before taking action. Might resent having to get every deal approved by the sales manager, does not like feeling controlled. Attention to detail might be a weakness; main focus is on getting sales results. An extremely tall column 7 individual can be uncooperative, especially under pressure.

Action Plan: Establish goals together. Review nonnegotiable policy up front. Set some parameters and give autonomy within those parameters. Make sure there is a reliable system in place for double checking paperwork accuracy.

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PARTICIPANT'S KEY TRAITS

This summary is based on the highest of the 8 columns. This page is **ideal for use with employee coaching.**

Shows a balance of assertiveness and caution. Comfortable showing initiative in relatively safe or familiar situations, and capable of dealing with moderate conflict on his/her own. Not highly aggressive or confrontational, but able to ask for what he/she needs. The type who can make suggestions, but does not want to seem pushy. Generally puts equal priority on team and individual goals. Tends to set realistic objectives and looks for reasonable advancement in career or responsibility.

A very outgoing and upbeat individual. Has a strong need to interact with other people; may have to make an extra effort to focus on tasks requiring a solitary effort. Very enthusiastic communication style; tends to use emotion, rather than detailed or technical information, when trying to persuade. Probably a good networker, promoter, and motivator, as well as a better speaker than listener. Has a strong need to project and maintain a favorable image. Not naturally technically-minded or analytical; relies primarily upon instincts when evaluating situations/devising strategies. Appreciates public praise.

A relatively fast-paced individual who prefers variety and change to routine and repetition. Can handle some time-consuming tasks, but may need to break each down into a series of short-term goals in order to gain a sense of accomplishment. Strives to get things done quickly; should be comfortable with pressing deadlines, new priorities, and change. More likely to stay motivated when handling multiple responsibilities than when having to focus on and finish one thing at a time. Routine and repetition will eventually frustrate this person.

Very independent decision-maker who likes doing things his/her way. Not necessarily a rules-bender, but does not want to feel controlled. Has a strong preference for general guidelines as opposed to strict, explicit rules. May be good at envisioning new ways for reaching goals. Need for regular management guidance is likely to be low unless he/she has a significant lack of knowledge about a particular situation. Deals relatively well with criticism. Much more concerned about results than processes; not naturally attentive to details or organized. May have to make an extra effort to maintain quality and motivation when handling tasks such as paper/processing work. Prefers an informal/unstructured work environment.

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DEVELOPMENT INSIGHT

The following sections provide an overview of the behavioral characteristics and preferences when a participant falls within the Target Ranges.

COMMUNICATION STYLE

Communication styles range from succinct and factually oriented (column 4) to gregarious and empathetic (column 3). Client advisors with more column 4 than 3 will probably be good listeners who focus on identifying customers' needs and discussing the specific advantages of each unit in relation to those needs. They are serious, knowledgeable and professional. With a higher column 3, the client advisor is apt to be enthusiastic and engaging, and should be adept at finding common ground with customers in an interpersonal sense. Likely to be emotionally persuasive when presenting your units.

STRENGTHS

Column 1: Negotiating, asking for the sale, remaining firm when customers make unrealistic demands, taking initiative to get sales.

Column 2: Low-key, collaborative sales approach, providing post-sale service and follow up.

Column 3: Creating excitement for your units, establishing and maintaining warm relationships with customers, showing empathy.

Column 4: Analyzing individual customers' needs and circumstances in order to find the best approach to making a sale, staying well-informed about your product lines and the industry in general, offering specific facts to convince customers.

Column 5: Working under time constraints, juggling different priorities, adapting to sudden changes.

Column 6: Persistence, patience, tolerance for routine/repetitious tasks.

Column 7: Making snap decisions, thinking of innovative ways to get results, recovering from setbacks. Column 8:

Carefully following instructions and guidelines, taking responsibility for handling details, cooperating with management.

CHALLENGES

Column 1: Might set unrealistically ambitious goals or could sometimes seem too forceful when negotiating with clients.

Column 2: Assertively managing the sales process, asking for the close, negotiating.

Column 3: Relating to skeptical customers who want straight answers and detailed information.

Column 4: Establishing instant rapport with new customers on the lot.

Column 5: Impatience and a tendency to take on too many tasks/challenges at once.

Column 6: Working in a time-sensitive environment, dealing with the unexpected, managing competing tasks.

Column 7: Checking details and closely adhering to procedures.

Column 8: Sensitivity to criticism or sales rejection.

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PACE

Ranges from moderate to fast. Your target client advisor should have a strong desire to accomplish goals quickly and to move units rapidly off the lot. Should be comfortable working under pressure of deadlines to meet sales quotas. Apt to be very flexible when required to handle different tasks at once. The presence of some column 6 can be beneficial, as it suggests some patience for following up and dealing with time-consuming customers.

ATTENTION TO DETAIL

Ranges from fair to strong. The taller the column 8, the greater the attention to detail you are apt to see. If column 8 is near the bottom of the range, then the client advisor should be moderately attuned to specifics but is mainly focused on simply getting sales. If column 8 is taller than column 7, then the client advisor should feel a personal responsibility for getting every detail of a customer's order correct. A tall column 8 suggests a very conscientious sales approach and an inclination to follow up diligently with customers.

MOTIVATIONAL STRATEGIES

Column 1 motivators: commission, competition with other client advisors, sales contests, professional growth opportunities. Column 3 motivators: public praise and symbolic awards for successes, a stylish office, status symbol perks such as tickets to events or the use of one of your most elegant units. Column 4 motivators: seminars and classes, factual feedback, mentally challenging assignments that require research and analysis. Column 5 motivators: short-term goals, being able to earn rewards immediately, frequent changes of pace, new initiatives or special projects. Column 7 motivators: independence, input into planning and decision-making. Column 8 motivators: specific guidelines, a structured work environment, frequent but diplomatic feedback.

DEMOTIVATORS

Feeling there are no opportunities to earn financial awards based on his achievements. Not being able to take individual initiative. Having to follow a predictable routine. Not being able to perceive immediate success or a frequent sense of accomplishment. A tall column 4 individual would be demoralized if he felt employees were evaluated in a subjective manner, or if his sales manager offered vague praise instead of serious, work-relevant feedback. For a tall column 3 client advisor, formal or serious feedback and an inability to interact with people would be cold buttons. A tall column 7 individual would not like to be closely monitored or have no say in decision-making, while a tall column 8 client advisor could be discouraged by criticism of his efforts or vague instructions/guidelines that require him to do a lot of guesswork.

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ACTION PLAN

Keep this client advisor continually challenged once he gets comfortable with core duties and consistently meets quotas. Make sure his goals are short-term in nature so that he can score quick wins, but avoid dictating the nature of those goals if the individual has more column 7 than 8. Be sure he makes use of organizational and time management aids, especially if his column 5 is very tall. Single out column 3 client advisors for praise at meetings, but offer discreet, factual commentary to taller column 4 individuals. Column 4 individuals will probably prefer having quantifiable goals to work toward, as this allows their performance to be objectively evaluated. Agree on objectives with tall column 7 client advisors and make plans with them, not just for them. Provide specific instructions to tall column 8 client advisors and make sure they have ready access to a sales manager, especially when they are getting started in the position.



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SUPPLEMENTAL QUESTIONS

The following behaviorally-based questions are a supplemental tool we provide to help you better evaluate the participant. They are not a substitute for your standard set of interview or professional development questions, but can provide additional, helpful information or prompt conversation.

1. How do you stay current on industry knowledge and up-to-date with the latest new vehicles?

2. How long have you been looking for a new job?

3. In what ways have you aggressively gone after new business in past positions?

4. What causes you to lose your temper?

5. What did you find most boring about your last job?

6. What sort of guidelines and what level of direction do you like to have when starting a new job?
