

Optimum Performance ProfileSM Sales Predictor

Assessment report for: laxman kareti

Primary Job Role: Consultative Selling

Candidate ID	20866
Organization	SCHNEIDER SALES MANAGEMEN
Date of Test	12/20/2022
Position Title	test



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Scoring Summary

Sales Role Scores

98	Sales or Service Supervision
95	Competitive Selling
91	Service
89	Consultative Selling
87	Complex Selling

Highest Score Sales Competency

Staying focused on achieving specific goals, adjusting the use of sales tactics until finding what works best

Potential Fatal Laws

- Discomfort with Selling
- Motivation/Effort/Comfort with Current Income
- Extreme or Inflexible Behavior Style
- Lack of Self-control/Impatience

Other Job Related Competencies

Detail Ability

Capacity for working accurately with detail and step by step work processes

8.1

Organization

Drive to organize work and time

7.8

Learning

Drive and willingness to learn and to accept feedback and coaching

7.9

Problem Solving

Ability to work with complex ideas and to identify cause and effect relationships

7.9

Collaboration

Willingness to work collaboratively with others

8.1

The Optimum Performance Profile is the world's only validated financial industry hiring tool that analyzes every candidate's behavioral fit for all five primary financial industry selling roles, predicts the likelihood of successful sales performance in each role, and provides behavioral interview questions for each of these roles.



ASSESSMENT FINDINGS

laxman kareti's predicted behavioral fit with the traits found to be associated with successful performance in Consultative Selling is:

- ☒ **Optimal behavior fit based on the sales, service or leadership dimensions of this job role. This candidate has a good chance of becoming a top sales producer in this job role.**
- ☐ Good behavioral fit for the sales, service or leadership dimensions of this job role with reservations based primarily on deficiencies that are easily "coachable."
- ☐ Good behavioral fit for the sales, service or leadership dimensions of this job role with reservations based primarily on deficiencies that are not easily "coachable". For example, if the candidate is a supervisor who will do a lot of selling, the deficiency may be a low score for the selling role that the candidate will be engaged in.
- ☐ Unlikely to optimize performance in this job role, but scores well on behavioral fit for one or more other sales, service or leadership roles.
- ☐ Unlikely to optimize performance in any of the five job roles assessed based on behavioral fit with the sales, service or leadership dimensions of these roles.

***Note: This assessment should never be used as the sole basis of evaluation for selection or rejection of a candidate for a specific position.** Interview guides should be forwarded to designated interviewers prior to their interviews, but assessment scores should NOT be forwarded until interviews have been completed to prevent interviewer bias. A candidate may succeed in a job role despite the job fit being an optimum fit for his or her strengths, or may fail to achieve optimum performance because of the unusual nature of the work environment or of other personality, motivation, work experience, or character issues not assessed by this instrument. Use the OPP instrument as a tool to help you screen out clearly unqualified candidates, and use our behavioral interview process to help you evaluate final candidates and make your hiring decision.



CONSULTATIVE SELLING

Job requires completing sales and service transactions, advising customers on product selection or use, closing first sales quickly, making add - on or follow - up sales, and managing selected customer relationships in primarily in-store, customer - initiated conversations.

Success in this role requires the adaptability, creativity, optimism, organization skills, creative quick thinking, and social leadership to build trust as an advisor, to diagnose customer needs and create a sales opportunity fast, and to lead sales conversations to a desired outcome.

SAMPLE JOB TITLES:

- New accounts advisor/personal banker
- Universal Service Representative/Universal Banker
- Contact Center Rep (In-bound service)
- Consumer Loan Officer
- Internal Mortgage Originator
- In-Store Sales Advisor
- Trust Administrator

Scores for this role are largely influenced by OPTIMUM RANGE SCORES on the following six behaviors factors which demonstrate a high correlation to the performance evaluations of top performers:

- Achievement Drive
- Creative Quick Thinking
- Organization
- Social Leadership
- Adaptability
- Optimism

89

Job Role Score



CAPSULE SUMMARY OF FINDINGS

Success in a consultative selling role requires the adaptability, creativity, optimism and leadership to build rapport, diagnose client needs and create sales opportunities fast.

laxman kareti Seems likely to succeed in this role based on scores consistent with strong behavior competencies in:

- Staying focused on achieving specific goals, adjusting the use of sales tactics until finding what works best
- Identifying possible options and solutions for clients, being proactive in persuading clients
- Demonstrating proactive sales leadership with clients
- Displaying confidence and optimism
- Thinking fast in resolving client concerns and proposing action

laxman kareti Also seems to have the behavior competencies that support eventual promotion to a sales or service supervisory role.

POSSIBLE SKILL
DEVELOPMENT NEEDS IF
SELECTED

Overall, **laxman kareti** seems to be a strong learner who will respond well to training and coaching. With regard to learning and skill development, **laxman kareti** may need training in how to:

- approach clients or answer the phone proactively to offer assistance
- make introductory statements to gain credibility with clients
- convert phone or walk-in inquiries into appointments or immediate sales interviews
- use trust building courtesy behaviors such as smiling, shaking hands and saying thank you
- ask questions to profile or diagnose client needs and to quickly qualify clients
- listen patiently and proactively

RECOMMENDED APPROACH
TO COACHING THIS
CANDIDATE IF SELECTED

In terms of day to day coaching and supervision, you will probably need to provide **laxman kareti** with:

- clear empowerment and encouragement to make decisions
- clear boundaries for making decisions within a designated scope of authority
- frequent opportunities to pursue on the job learning, formal education and practical skill development
- step by step checklists of what to do in various situations
- step by step certification of required selling skill mastery
- formalized peer coaching from coworkers as day to day mentors

POTENTIAL FATAL FLAWS

The aspects of behavior that could potentially sabotage **laxman kareti's** success in this job role if not addressed through coaching are:

- Discomfort with Selling
- Motivation/Effort/Comfort with Current Income
- Extreme or Inflexible Behavior Style
- Lack of Self-control/Impatience



FIT BY JOB ROLE

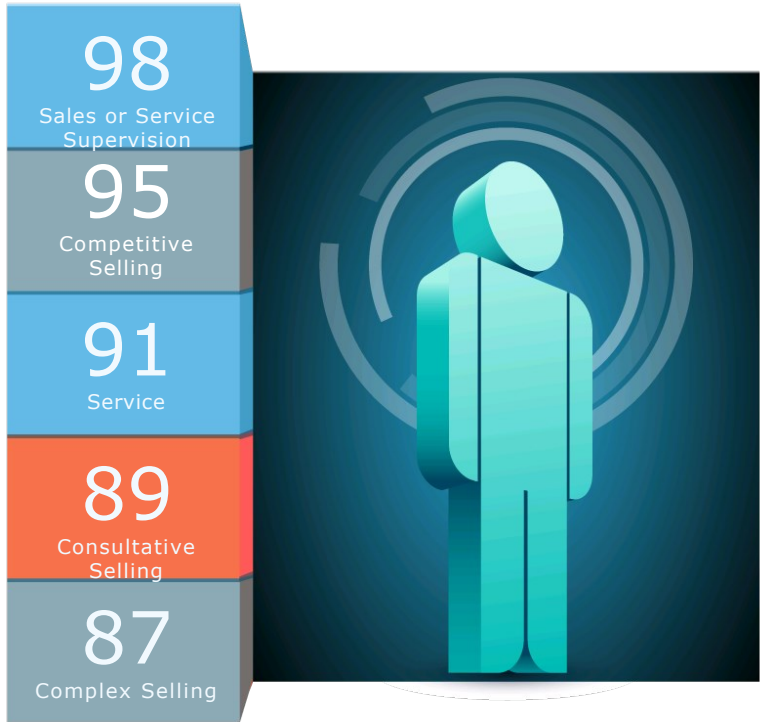
This section reports how laxman kareti scored on the competencies found to be most related to success in each of five job roles compared to all candidates assessed nationally who were currently employed in that job role.

The relative importance of various competencies to success, the set of behavior traits that make up each of these competencies, and the impact of various behavior traits on scoring differ by job role. Despite these differences, it's possible that a candidate who has superior social skills may demonstrate optimum behavioral fit with more than one job role.

While this candidate is primarily being assessed for the Consultative Selling role, these scores can be used to determine the candidate's "fit" with the requirements of all five job roles. The two key questions that these scores answer are, "Is the candidate likely to succeed in the role for which they are being assessed?" and "Which job role best optimizes this candidate's strengths?"

This analysis can be particularly helpful in evaluating a candidate's potential for upward mobility to a higher level sales or supervisory position, or in evaluating a candidate's potential fit for a different position in the event that they are not selected for the job role for which they were originally tested. If you're evaluating a candidate for a sales supervision role that will involve a lot of personal selling, you should also consider the candidate's score for the type of selling that they will be engaged in.

JOB FIT RANKING



POTENTIAL FIT FOR OTHER JOB ROLES



SALES OR SERVICE SUPERVISION
(LEADERS)

Job primarily requires direct supervision and coaching of front-line employees in service, consultative selling and engagement selling roles, including some operations responsibilities, but not including overall department, business unit or branch sales or profit responsibilities, and typically requires some selling.

SAMPLE JOB TITLES

- Business Unit Manager
- Regional Manager
- Branch or Store Manager
- Sales Manager
- Assistant Branch Manager
- Operations Supervisor
- Contact Center Supervisor



COMPETITIVE SELLING
(CLOSERS)

Job requires continuous prospecting, competing for sales persistently despite high rejection rates, conducting minimal after-sale servicing, and closing competitive sales in one or two interviews using emotional pressure.

SAMPLE JOB TITLES

- Investment Officer
- Business Development Officer
- Small Business Banking Officer
- External Mortgage Originator
- Wholesale Mortgage Lender
- Contact Center Rep(Outbound Sales)
- Merchant Services Rep
- Real Estate Listing Agent
- Commissioned Insurance Broker



SERVICE
(DOERS)

Job requires servicing customer transactions and maintaining friendly customer relations, and may require conducting some referral or suggestive selling

SAMPLE JOB TITLES

- Teller
- Receptionist/Greeter
- Contact Center Rep(In-bound service)
- Loan Processor
- Retail Sales Clerk
- Sales Assistant



COMPLEX SELLING
(PLANNERS)

Job requires closing large, complex or technical sales over a long selling cycle, analyzing prospect problems and product applications to propose customized solutions, networking socially for new business, and retaining and developing customer relationships over time.

SAMPLE JOB TITLES

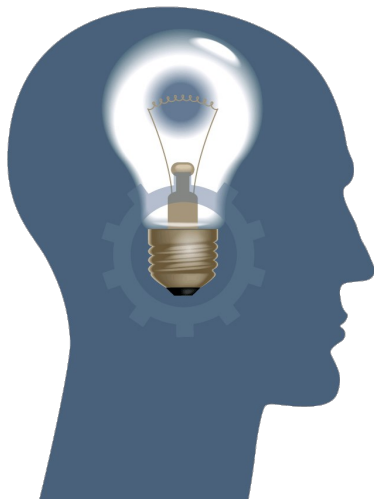
- Commercial Loan Officer
- Trust Employee Benefits Officer
- Wealth Management Advisor
- Private Banker
- Cash Management Officer
- International Banking Officer
- Correspondent Banker

BEHAVIOR PROFILE FOR
PRIMARY JOB ROLE

This section reports how laxman kareti scores on various behavior traits as shown by the large red bars, and how each score compares to the typical scoring range of top performers in the primary job role. These scores can be used to select topics to pursue in more detail in your interviews with laxman kareti.

The smaller blue bars show the ideal scoring range for each trait for the Consultative Selling role based on the typical scoring range of high performing employees in this job role.

The ideal scoring range for any single behavior trait may be high or low depending on the behavior required for the job role and on the ideal interaction among that trait and others. Scores that are far outside the normal range for top performers could represent either significant strengths or weaknesses.



Self-Management
(How the candidate manages their thoughts and feelings)

1 2 3 4 5 6 7 8 9 10

Social Confidence

Feeling capable and confident in social situations



Resilience

Sustaining effort in the face of adversity and bouncing back from setbacks



Conscientiousness

Taking responsibility for reliable performance in completing tasks



Stability

Absence of excessive anxiety, worry, and stress



Detail Ability

Capacity for working accurately with detail and step by step work processes



Tactical Planning

Capacity for preparing strategies and action plans



Risk Taking

Willingness to take calculated risks



Decisiveness

Willingness to make a decision and assume a firm position in negotiations with others



Organization

Drive to organize work and time



Adaptability

Flexibility in adapting to changing situations



CAPSULE SUMMARY

laxman kareti does not score within the range of top performers for any behavior trait in this section. Test scores indicate that your interviews should specifically explore *Social Confidence*, *Resilience*, *Conscientiousness*, *Stability*, *Detail Ability*, *Tactical Planning*, *Risk-taking*, *Firmness*, *Organization* and *Adaptability* behavior traits for which they scored outside the range of top performers suggesting the presence of either significant potential strengths or weaknesses.

Motivation

(How the candidate energizes their behavior in pursuit of goals)

1 2 3 4 5 6 7 8 9 10

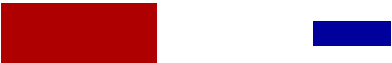
Achievement Drive

Drive to exceed goals or an internal standard of achievement and to improve performance



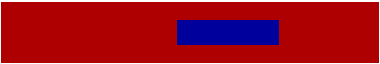
Optimism

Maintaining a positive outlook about the future and explaining life events in terms of having personal cause and effect control over the outcome of these events



Competitiveness

Drive to outperform others and to be recognized as the best



Initiative

Readiness to take proactive action to influence events or to achieve goals



Social Leadership

Drive to take charge in social situations and to lead conversations



Energy

Stamina to work fast consistently at a high level of energy while maintaining concentration



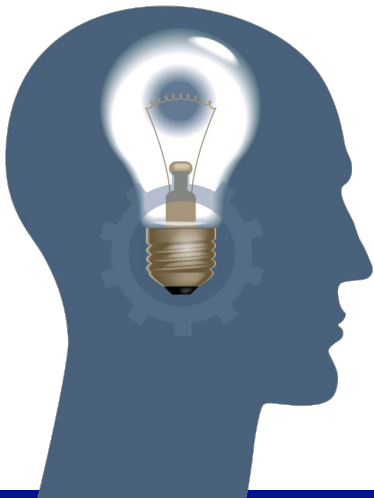
Developing Others

Drive to coach and develop others



Drive to Persuade

Drive to influence others and enjoyment of the process of persuasion



CAPSULE SUMMARY

laxman kareti scores within the range of top performers on *Achievement Drive*. Test scores indicate that your interviews should specifically explore *Optimism, Competitiveness, Initiative, Leadership Drive, Energy, Coaching and Drive to Persuade* behavior traits for which they scored outside the range of top performers suggesting the presence of either significant potential strengths or weaknesses.

Guidance

(How the candidate steers their behavior)

1 2 3 4 5 6 7 8 9 10

Empathy

Capacity to understand situations from others' points of view and to display visible concern for others



Self-Sacrifice

Willingness to inconvenience oneself to help others



Originality

Willingness to seek new and creative ways to do things



Creative Quick Thinking

Capacity to think quickly on your feet and to respond effectively



Learning

Drive and willingness to learn and to accept feedback and coaching



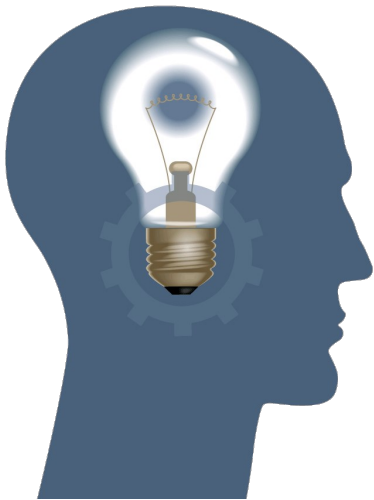
Patient Listening

Capacity for self control in listening to others without talking too much



Problem Solving

Ability to work with complex ideas and to identify cause and effect relationships



CAPSULE SUMMARY

Iaxman Kareti does not score within the range of top performers for any behavior trait in this section. Test scores indicate that your interviews should specifically explore *Empathy, Self-Sacrifice, Originality, Quick-Thinking, Learning, Patient Listening and Problem Solving* behavior traits for which they scored outside the range of top performers suggesting the presence of either significant potential strengths or weaknesses.

Social Skill

(How the candidate communicates with others)

1 2 3 4 5 6 7 8 9 10

Persuasiveness

Capacity using a variety of persuasive behavior effectively in social interactions



Sociability

Seeks and enjoys social contact and makes an effort to build rapport with others



Assertiveness

Willingness to ask for what you want, to say no, and to express yourself directly and honestly



Versatility

Willingness to shift your usual behavior to fit the needs of the circumstances and the preferences of others



Warmth

Capacity for projecting friendliness and warmth that builds trust in others



Energizing

Enthusiasm

Capacity for displaying excitement and for energizing others



Collaboration

Willingness to work collaboratively with others



Proactive Social

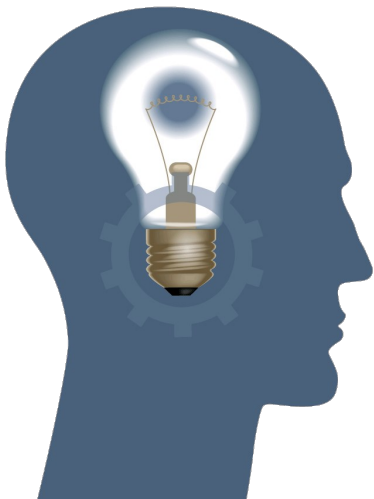
Behavior

Capacity to engage in proactive social behavior without experiencing excessive discomfort



Emotional Pressure

Willingness to apply emotional pressure when needed in social situations



CAPSULE SUMMARY

Iaxman Kareti scores within the range of top performers on *Versatility*. Test scores indicate that your interviews should specifically explore *Persuasiveness*, *Sociability*, *Assertiveness*, *Warmth*, *Enthusiasm*, *Collaboration*, *Proactive Social Behavior* and *Emotional Pressure* behavior traits for which they scored outside the range of top performers suggesting the presence of either significant potential strengths or weaknesses.

