



Career Profile Advantage

Confidential Report For

Thomas Jordan

Featuring

- Career Profile Advantage

Test Version: Career Profile Advantage -- Sales

Questions? Contact your ExSel Coordinator, email exsel@limra.com, or call (0)+1 888-785-4672.

For Thomas Jordan

Making an Effective Selection Decision

A hiring manager's most critical responsibility is making the right selection decisions for his or her organization. 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 organization?

The Career Profile Advantage 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?

The first section of the report indicates how well a candidate's background and core competencies align with the characteristics of others who have succeeded or failed in the industry. From this perspective, it helps you answer the question "Can the candidate do the job?"

If the answer to this question is "Yes, the candidate meets my requirements and seems to have the basic qualifications," you may choose to continue on to the next section of the feedback report.

Will the Candidate Do the Job?

This section focuses on personality characteristics related to success in financial services sales, and how the motivational factors they capture 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, the candidate's score, general qualities frequently observed in people with this score, likely sales behaviors, a summary, and coaching tips.

Does the Candidate Fit?

The final section will help you determine if the candidate's career goals, preferences, and beliefs indicate that he or she will thrive in your organization — does your position offer the type of environment the candidate is looking for?



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Can the Candidate Do the Job?

Test Accuracy Interpretation

This report can be interpreted with confidence.



For Thomas Jordan

Career Profile Advantage Rating: 13

The Career Profile Advantage rating 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?”

Probability of Sales Success

Across all users in MLEA companies, approximately 39 out of 100 candidates with backgrounds similar to this candidate are expected to be successful. Compared with the average MLEA candidate, this individual has a 12 percent better than average chance of being a successful agent.

A “successful” agent 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

Survival and Productivity

The Career Profile Advantage rating is a combination of two factors: predictors of 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 sales “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 the average candidate:

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



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Will the Candidate Do the Job?

This section focuses on personality characteristics related to success in financial services sales, and how the motivational factors they capture 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

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

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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 Moderate in Persuasiveness:

General Qualities

- Can be convincing, under the right circumstances
- Enjoy trying to talk people into things, unless a lot of effort is required
- Sometimes enjoy arguments where they try to persuade others
- Have some talent for influencing people

Sales Behaviors

- Possess average sales skills
- May feel uncomfortable discussing business in social situations, but will do it if it is required
- Work best when given some freedom to operate within general guidelines
- Will attempt to defend their point of view before backing down
- Usually accept constructive criticism from their manager, but may become defensive

Summary

This candidate will likely be able to approach and market products to individuals under certain circumstances, although he or she may also avoid situations where a lot of extra effort is required. In certain situations, this candidate may have difficulty establishing comfortable relationships with others and actively pursuing the opportunity to make contacts. If he or she has a complete understanding of a product or service and truly has confidence in the product's merits, this candidate will probably have greater success marketing it.

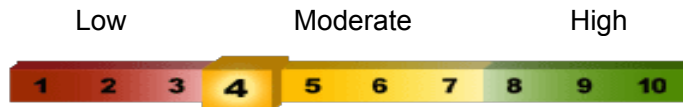
Coaching Tips

Generally, candidates with moderate persuasiveness underperform in closing sales. They tend to perform best when they believe in the value of the product or service they are providing. Provide in-depth product training. It is important that the candidate fully believe in a product before he or she is able to successfully market it. Provide clear expectations on sales practices, compliance, and product suitability.

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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 Moderate in Energy:

General Qualities

- Are as energetic as the average person
- Like to work at a steady pace
- Can work at a rapid pace temporarily when it is required
- Keep themselves busy without taking on too much

Sales Behaviors

- Have reasonably efficient work habits
- Can make decisions quickly when required, but would prefer to take more time
- Sometimes fail to delegate appropriately
- Take an average amount of time to learn complex new material
- Try to increase effort levels for sales contests, but follow-through is sometimes lacking

Summary

This candidate is able to work briskly on tasks that demand attention for brief spurts of time but may have difficulty maintaining steady production through constant progression toward goals. This candidate may need to be continually reminded to proactively update managers on progress and to make use of all available resources in order to succeed. Although he or she may usually be prepared for product presentation, this candidate may often fall back on a scripted presentation that is not tailored to a particular prospect. This candidate should participate in goal-setting objectives on a regular basis and may need to be reminded of his or her progress.

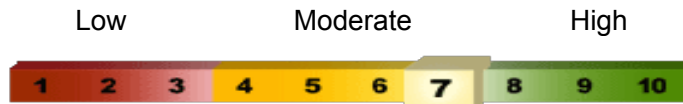
Coaching Tips

Generally speaking, candidates with moderate energy can succeed in sales if other critical competencies are present. If you continue with the candidate, it may be helpful to keep the following coaching tips in mind: Allow the candidate to participate in his or her own goal-setting plans on a regular basis. Monitor prospect follow-through and assess realistic perception of number of contacts needed for one sale.

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Achievement Drive

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



Candidates who score Moderate in Achievement Drive:

General Qualities

- Like to measure their performance against goals they will probably meet
- Try to live up to existing standards of performance
- Are generally motivated to do a good job
- Sometimes consider how to improve their own or the group's performance

Sales Behaviors

- Will work with their manager to set somewhat challenging but realistic sales goals
- May sometimes try to exceed the sales goals set for them
- Occasionally become frustrated with the difficulties or prospecting
- Are sometimes thrown off by a sudden change in schedules or priorities

Summary

This candidate may attempt to set somewhat challenging personal goals, although he or she may not go above and beyond set standards unless challenged to do so. This candidate is likely to respond positively to coaching and may attempt to adopt strategies that he or she feels will help raise productivity. This candidate will likely display an average ability to identify, qualify, and market to potential clients.

Coaching Tips

Generally speaking, candidates with moderate achievement drive can succeed in sales positions if other critical competencies are present. Should you continue with this candidate, it is important to remember that he or she will often perform best when managers set clear expectations for his or her performance. Actively engage this candidate in the goal-setting process so that he or she will truly "adopt" objectives. Maintain consistent communication and ensure that goals become progressively more difficult.

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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 Moderate in Initiative and Persistence:

General Qualities

- Like to finish what they have started
- Will take on new responsibilities when asked to
- Are willing to work as long and hard on a project as most people are
- Will occasionally work extra hours to complete things
- Can maintain a high level of effort for a while before losing motivation

Sales Behaviors

- Usually accept rejection without becoming discouraged
- Will make several attempts to overcome objections before giving up
- Sometimes procrastinate before asking for an appointment
- Require an average amount of their manager's time
- Respond to service-related calls as time permits

Summary

This candidate will most likely adopt goals that are set for him or her and complete whatever work is needed to meet the goals. This candidate may set even more challenging personal goals but may not maintain as high a level of effort for a continued period of time as some. This candidate may need to be consistently reminded of objectives and deadlines but will generally act as his or her own critic when evaluating progress.

Coaching Tips

Generally, candidates with moderate initiative and persistence perform best when they have clear goals in mind. The following should be taken into consideration if you continue with this candidate: Conduct regular meetings for the candidate to update you on progress, as procrastination may be an issue if not confronted early. Educate the candidate on the link between superior customer service and repeat business and referrals.



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Does the Candidate Fit in Your Organization?

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

- Motivators
- Concerns
- Expectations

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



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Motivators

Motivators do NOT impact the overall Career Profile Advantage rating.

The chart below shows 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.

	Not Important	Somewhat Important	Important	Very Important	Extremely Important
Independence					
Influence					
Recognition					
Prestige					
Money					
Security					
Continuous learning					
Positive impact on the community					
Leisure time					
Work/Family balance					
Advancement					

The candidate's responses indicate:

He or she is not highly motivated by non-work activities, which may include time with family or friends.

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Concerns

Concerns do NOT impact the overall Career Profile Advantage 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.



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Expectations

Expectations do NOT impact the overall Career Profile Advantage 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 organization according to your Sales Organization Profile, if available.

Candidate's Response

Number of evenings typically worked per week	3 evening per week
Number of hours per week spent learning sales presentations and product information during first few weeks after licensing	16 to 20 hours per week
Number of hours per week spent on the telephone for business purposes	21 to 25 hours per week
Total number of hours worked per week	60 hours or more per week
Money spent per week on out-of-pocket business expenses	\$100 to \$149 per week
Number of contacts needed to get one sales interview	20 to 24 people
Number of sales presentations needed to get one sale	5 or 6 presentations
Number of sales for a typical first-year producer in this organization	100 to 199 sales
Average income for a typical first-year producer in this organization	\$50,000 to \$99,999
Amount candidate expects to earn in his or her first year in this organization	\$50,000 to \$99,999
Average income for a typical third-year producer in this organization	\$125,000 to \$149,999
Amount candidate expects to earn in his or her third year in this organization	\$125,000 to \$149,999

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Interview Questions: Sales Personality

These interview questions focus on personality characteristics related to sales success in the MLEA position.

Persuasiveness

Ask: 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?

Making a major purchase (such as buying a car or a house) can involve some negotiating. Tell me about a time when you negotiated a purchase. How did you feel about the negotiation process?

Listen for: Signs that the candidate enjoys the persuasive process; fluency of expression; confidence

Your Rating for Persuasiveness:

① Poor ② ③ Average ④ ⑤ Excellent

Energy

Ask: 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?

Listen for: High activity level; impatience with a slow pace; desire to schedule his or her own time and tasks

Your Rating for Energy:

① Poor ② ③ Average ④ ⑤ Excellent

Achievement Drive

Ask: 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?

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?

Listen for: Love of a challenge; internal motivation to succeed; the tendency to introduce competition into

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situations

**Your Rating for
Achievement Drive:**

① Poor ② ③ Average ④ ⑤ Excellent

Initiative and Persistence

Ask: Sometimes it is easier to “sit tight” and do nothing instead of tackling a difficult problem or situation. Can you tell me about a difficult situation in which you took action, even though the best response was unclear? Would you do anything differently the next time?

Have you ever worked harder than usual to accomplish something you really wanted? How did it work out? Were you successful?

Listen for: Proactive nature; resilience in the face of rejection; desire to work independently

**Your Rating for
Initiative and
Persistence:**

① Poor ② ③ Average ④ ⑤ Excellent

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Interview Questions: Motivators

The candidate indicated the following motivators are very or extremely important:

- Independence
- Influence
- Prestige
- Money
- Positive impact on the community

Use questions such as the following to engage the candidate in a dialogue regarding these goals, and how these might be realized in a sales career with your organization. If there are clear matches with your organization, use this as a way to continuously engage the candidate in the selection process.

What does (motivator) mean to you?

Why is this important to you?

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



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Interview Questions: Concerns

The candidate indicated no concern with the following areas:

- Approaching people I know for business purposes
- Finding enough prospective clients
- Being able to use the latest technology
- Keeping current with industry knowledge
- Using my own money for business expenses
- Meeting expectations of management
- Answering in-depth questions about complex financial products
- Working long hours
- Mixing business with pleasure at social events
- Being able to accept rejection from potential clients
- Having enough time for friends and family
- Being accepted as a trusted advisor by clients

You may want to consider any key areas listed here that are challenges in your particular organization, and then focus on those areas in your discussions with the candidate.

Use the following questions to ask the candidate about these issues.

Sometimes new agents struggle with this area. Tell me about an experience that gives you confidence in your ability to handle this.

Are there any circumstances under which you feel this might be difficult for you?



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Interview Questions: Expectations

As a reminder, it is a best practice to ensure that the candidate's expectations are aligned to the realities of the job in your organization. It is recommended that you refer back the candidate's responses in Expectations – and how they align to your Sales Organization Profile, if available.

Again, it is important that the candidate clearly understands the expectations that are typical of your organization. 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.

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 Advantage 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.

Remember that this candidate's results are:

Career Profile Advantage Rating: Proceed

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?

- 1.
- 2.
- 3.

If you continue with this candidate in your selection process, what objectives will you develop for the rest of your process? How will you explore these themes or concerns?

- 1.
- 2.
- 3.