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RELEASE POTENTIAL

SAMPLE SALES EFFECTIVENESS DIAGNOSTIC

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EXECUTIVE SUMMARY – JAKE R.

Jake appears to be a strong fit for a people-facing insurance sales role, especially one that requires trust-building, direct communication, energy, and the ability to guide clients through a decision. His report shows very high persuasive and social service interests, and his top career match includes Sales & Related, which explicitly includes insurance.

For individual health insurance sales, that likely means he can do well in early and middle stages of the client journey: opening conversations, earning attention, simplifying choices, handling pushback, and helping clients feel supported. His sales map also suggests he is most effective when he can be direct, engaging, competitive, and relationship focused.

The main risk is not lack of sales drive. The main risk is **mismanaging internal pressure**. Jake's report shows a strong gap between how direct and high-energy he appears on the outside and how much respect, emotional support, private processing time, and decision space he may need on the inside. Under stress, that gap may show up as withdrawal, indecision, worry, sensitivity to criticism, over-competitiveness, or pushing too hard for the sale. In insurance, where buyers are often anxious, confused, and cautious, that tension matters.

So the picture is promising. Jake likely has the natural sales fuel for this work, but his best results will probably come when he uses more structure in discovery, slows down at decision points, and protects his energy instead of running hot all week.

OVERALL ROLE FIT

Jake's fit for individual health insurance sales appears strong. His interest pattern is especially aligned with work that involves persuading, helping people, and building trust. His highest interests are **Persuasive 99** and **Social Service 98**, while Sales & Related is one of his top career areas and includes insurance.

That combination matters in this market. Individual health insurance buyers are often not buying for status. They are buying because they are uncertain, worried about cost, worried about access, or trying to protect themselves or family members. A seller who enjoys both influence and helping may be better positioned to translate complexity into reassurance without sounding purely transactional. Jake's sales report also says he tends to be more effective when he believes the

product or service genuinely benefits the prospect. That is a strong match for consultative insurance selling.

The fit looks strongest in roles where he can:

- build direct client relationships,
- control the flow of the conversation,
- simplify complex options,
- work at a fast pace with variety, and still have enough autonomy to manage his schedule and recharge.

The fit looks weaker in roles where he is forced into heavy routine, constant group activity, highly scripted selling, or very little control over pacing and decisions. Those conditions may not stop performance at first, but over time they could increase stress reactions and reduce consistency.

LIKELY STRENGTHS

Jake likely brings real presence to the front end of the sale. His report shows very high Social Energy Usual at **99**, which is above the sales-related norm of **82.28**, and very high Physical Energy Usual at **99**, above the sales norm of **77.73**. That suggests he may come across as warm, accessible, active, and ready to move. For insurance buyers, that can help lower anxiety early and create momentum.

He also appears able to take charge of the conversation. His sales map describes him as direct, engaging, competitive, decisive, and comfortable with strangers. His Assertiveness Usual is **72**, above the sales norm of **47.14**, which suggests he may be more willing than many salespeople to speak clearly, guide the process, and address hesitation directly.

Another strength is likely speed with variety. His Restlessness Usual is **96**, far above the sales norm of **47.93**. That often supports fast transitions, responsiveness, and comfort handling many moving parts. In health insurance sales, this may help with juggling leads, plan options, deadlines, follow-ups, and objections across multiple clients.

He also seems able to organize the selling message well. The report says he tends to be most effective when he can move the prospect logically from one point to another in an organized way. His Insistence Usual is **85**, above the sales norm of

70.12, which may support structured presentations and orderly follow-through when he is at his best.

LIKELY CHALLENGES OR RISK AREAS

The biggest development risk appears to be the gap between Jake's outward style and inward needs. He may look highly social, direct, and fast-moving, but the report shows he may need private time, appreciation, emotional support, and time for complex decisions. If others miss that, he may become discouraged or reactive without showing it right away.

In an insurance setting, that may create four practical risks.

First, he may move faster than the client is ready for. His style may help him simplify choices, but it may also make him sound too black-and-white when a client needs time to compare tradeoffs. His report specifically notes that under stress he may get pulled into minor ambiguities or delay decisions, which is an important tension: he may look decisive while feeling internally uncertain.

Second, he may take pushbacks personally more than people realize. His usual style is frank and matter of fact, but his needs show a strong desire for respect and appreciation. In a buyer market where people question price, coverage, commissions, and motives, that could trigger defensiveness or over-explaining.

Third, his competitive side may help him win, but under pressure it may shift from client advocacy to personal advantage. The report warns that when needs are not met, he may become opportunistic, self-promotional, or too focused on winning. That is a meaningful coaching issue in health insurance, where trust and ethics drive referrals and retention.

Fourth, his energy may be less durable than it looks. He can likely run hard, but the report is clear that he still needs time to recharge. Without that, fatigue may show up as delay, indecision, loss of warmth, or improvising instead of following the process.

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SIGNIFICANT STRENGTHS AND NEEDS

THREE MOST SIGNIFICANT USUAL BEHAVIORS

Restlessness Usual: 96 – unique
Sales norm: **47.93**. Gap: **+48.07**. This is clearly unique.

In work behavior, this likely means Jake prefers variety, motion, multiple inputs, and a changing pace. He may be energized by a day full of calls, plan comparisons, urgent questions, and shifting client needs. Business impact can be positive in a fast-moving insurance environment because he may respond quickly and keep momentum alive. Others may see him as lively, adaptive, and energized, but at times also distractible or impatient with slow processes. Under pressure, this may reduce concentration and make him chase secondary issues.

Assertiveness Usual: 72 – unique
Sales norm: **47.14**. Gap: **+24.86**. This qualifies as unique by the 20-point rule.

In work behavior, this likely means Jake is more willing than many salespeople to direct the conversation, state an opinion, challenge weak reasoning, and move a client toward decision. Business impact can be strong in enrollment conversations and objection handling. Others may experience him as confident and helpful when he is calibrated well, but as pushy if he debates too hard or closes before the client feels fully heard. The report also warns that under stress this can become domineering.

Physical Energy Usual: 99 – unique
Sales norm: **77.73**. Gap: **+21.27**. This qualifies as unique.

In work behavior, this likely means Jake can sustain a demanding pace and may enjoy being active and busy. Business impact is positive for call volume, responsiveness, and visible effort. Others may see him as tireless. The caution is that his visible energy may hide a real need to recharge. If he ignores that, he may suddenly slow down, postpone action, or lose enthusiasm.

THREE MOST SIGNIFICANT NEEDS

Physical Energy Need: 2 – unique
Sales norm: **54.69**. Gap: **-52.69**. Clearly unique.

This suggests Jake likely needs much more control over pace and scheduling than people would assume from his high-output style. In work terms, he may perform best when he can choose when to sprint and when to reset. Business impact is large: without recovery time, effort may stay high for a while, but judgment and consistency may fall. Others may misread him here because he can look like someone who should always be "on."

Emotional Energy Need: 97 – unique
Sales norm: **47.94**. Gap: **+49.06**. Clearly unique.

This suggests he may need a more emotionally supportive environment than his objective, practical style shows. In work behavior, he may need trusted outlets, reassurance, and signs that others care about what is weighing on him. Business impact is important because insurance selling often includes rejection, anxious clients, and emotionally loaded decisions. If that emotional load is ignored, he may become overly sensitive, discouraged, or less objective. Others may be surprised by this because he does not naturally present as highly emotional.

Self-Consciousness Need: 94 – unique
Sales norm: **48.86**. Gap: **+45.14**. Clearly unique.

This suggests a strong need to feel respected, appreciated, and able to explain his thinking. In work, blunt feedback, public correction, or dismissive treatment may hit harder than expected. Business impact shows up in resilience and coachability: he may respond very well to strong coaching when it is respectful and direct, and poorly when it feels careless or demeaning. Others may not see this need because his outward style is frank and confident.

INTERESTS THAT MAY HELP OR HINDER THE WORK

Jake's high interests fit this market well.

Persuasive: 99 likely helps because individual health insurance sales requires influence, explanation, and confidence asking for commitment. It may also create energy for prospecting, follow-up, and handling objections. The risk is overusing persuasion before enough discovery has happened.

Social Service: 98 likely helps because this market rewards empathy and buyer advocacy. Clients often need help understanding what fits their lives, not just what is available. This interest may make Jake more believable when he explains value and protection. The risk is spending so much time helping that he delays asking for the decision.

His low interests also matter.

Technical: 19 may hinder performance if the role requires deep comfort with systems, platform demos, or technical product explanations without support. He may still learn the material, but it may not energize him. That means product mastery should be tied to client outcomes, not just features.

Artistic: 4 is not a problem for selling insurance, but it suggests he may not naturally focus on branding polish or aesthetics unless coached to do so. His report explicitly warns that appearance may matter to others more than it does to him. In insurance sales, that can show up in presentation materials, enrollment documents, or the visual professionalism of his outreach.

Scientific: 4 may hinder enjoyment of highly research-heavy or detail-heavy analysis. That does not mean he cannot understand plan details. It suggests he may prefer to learn what matters practically and explain it simply rather than dive deeply into technical comparisons for their own sake.

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STRENGTHS AND CHALLENGES BY WORK STAGE

Prospecting and first contact

Jake likely does well here. He appears comfortable meeting people, direct in approach, and energized by movement and variety. He may be more willing than average to start conversations and keep momentum.

The challenge is pacing. He may come on too strong with buyers who are just beginning to explore options.

Discovery

This is potentially strong if he stays disciplined. His Social Service interest may help him care about the person, not just the policy. His structured side may help him organize questions well.

The risk is impatience with detail or moving to solution before fully understanding the client's actual medical, budget, provider, and timing concerns.

Presentation and recommendation

This may be one of his strongest stages. The report says he can structure a presentation logically and reduce complex issues to basic terms prospects can understand. That is especially useful in health insurance, where confusion kills momentum.

The caution is to avoid oversimplifying tradeoffs.

Objection handling

Jake likely has natural capacity here. He can probably handle pushback and does not appear afraid of vigorous discussion.

The risk is turning objection handling into debate or reacting to skepticism as disrespect.

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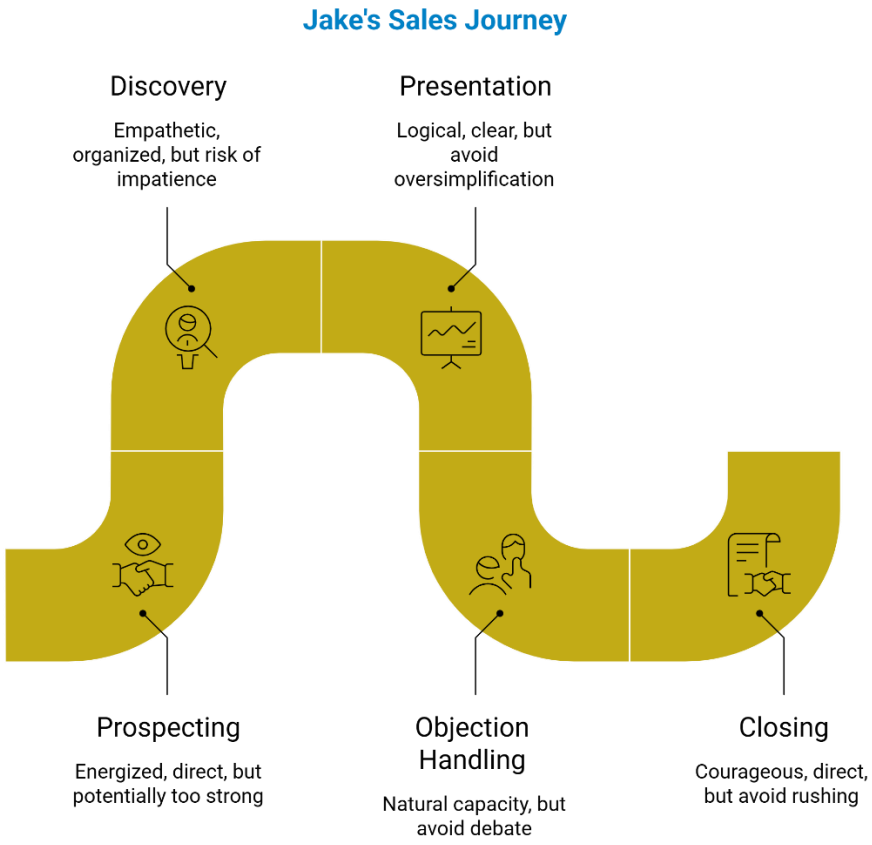
Closing

He likely has the courage and directness to ask for the business.

The risk is closing too fast when the buyer still needs time or delaying the close when stress creates internal doubt.

Follow-through and retention

This looks mixed. His organized side can help follow-through, but his very high restlessness means routine service work may drain him faster. He may benefit from a visible system, short checklists, and clear next steps to stay consistent after the sale.



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COMMON DEVELOPMENT THEME

Jake's main development theme appears to be:

Slow the pressure, not the pace.

He likely does not need help becoming more active, more persuasive, or more assertive. He likely needs help staying grounded, structured, and client-centered when the pace gets intense or the buyer gets emotional. His best growth may come from learning how to keep his direct, energetic style while adding more deliberate discovery, calmer decision support, and better recovery habits.

90-DAY DEVELOPMENT PLAN

Days 1–30:

Build a more disciplined client process

The goal in this phase is to protect discovery quality.

Jake should use one standard discovery framework for every health insurance conversation. For example, It should include current coverage, budget range, provider needs, prescription needs, expected usage, family situation, time pressure, and the client's biggest fear about coverage. He should not present a recommendation until all fields are complete.

He should also add one sentence to slow his pace at the right moment:
"Before I recommend anything, I want to make sure I understand what matters most to you."

A second practice is to use a two-option rule. Present no more than two best-fit options first, and explain the tradeoff in plain language. That plays to his strength in simplifying complexity without overwhelming the buyer.

He should track:

- discovery completion rate,
- show-to-close rate,
- and number of appointments where next steps are clearly documented.

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Days 31–60:

Improve objection handling and trust preservation

The goal here is to keep assertiveness from becoming pressure.

Jake should practice a three-step objection response:

1. Name the concern.
2. Clarify the real issue.
3. Recommend a next step.

Example:

"It sounds like cost is the main issue. Is it the monthly premium, the deductible, or the total risk if something happens? Based on that, here are the two smartest paths."

He should also add one self-check before closing:
"Am I helping this client decide, or am I trying to win?"

That question matters because his report suggests competition can become overactive under pressure.

He should track:
objection-to-close conversion,
buyer hesitation reasons,
and any deals lost after strong initial momentum.

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Days 61–90:

Improve resilience and consistency

The goal here is to prevent stress drift.

Jake should block recovery time into his calendar just like prospecting time. His report strongly suggests that he needs more recovery and schedule control than people may assume. That means at least two short reset blocks each workday and one longer weekly review block with no client calls.

He should use a weekly review with four questions:
Where did I rush a buyer?
Where did I debate instead of guide?
Where did I lose focus on the main issue?
Where did I do my best client-centered work?

He should also have one trusted person, manager or peer, with whom he can process emotionally loaded weeks. That fits his high need for emotional support and respect.

He should track:
energy level by week,
number of delayed decisions,
rework caused by incomplete discovery,
and referral requests made after enrollment.

SELF-COACHING PRIORITIES OR MANAGER COACHING PRIORITIES

Jake will likely respond best to coaching that is direct but respectful. His report suggests he benefits from clear expectations, individualized incentives, room to express concerns, and enough time to think through important choices.

The most useful coaching questions may be:
“What did the client actually need?”
“Where did you simplify well?”
“Where did you move too fast?”
“What part of the process broke down?”
“What support do you need this week to stay effective?”

Less helpful coaching would be vague criticism, public correction, overscheduling, or comparing him too heavily to the group. His coaching guidance specifically warns against measuring him only against the group and recommends frequent variety, reassurance, and careful listening.

Assumptions and Limits

This is a sample interpretation for Jake R. in the context you gave: an executive director at Company XYZ, viewed here as a sample for an insurance sales professional serving individuals shopping for health insurance. It is a development read, not a hiring decision and not a diagnosis. It describes likely patterns, not certainty.