

Confidential Results

CareeR_x[™] Developmental Report



Financial Sales Assessment Program (FSAP)

Results for:

**John Doe
ID# 123-45-6789
July 29, 2004**

Career Prescription (CareeRx™)

This performance plan is specific to your personalized needs and is recommended based on your assessment results. Work your plan with your coach for maximum success.

Developmental Priorities

Sales Presentation — Describes financial products and services clearly and effectively. Responds effectively to customer questions or objections. Recommends account style or set-up to provide maximum value/satisfaction to customer. Uses printed material appropriately during sales presentation. Tactfully recommends that customers purchase financial products and services.

Recommended Activities for Sales Presentation	To Be Completed By:	Completed:
On-the-Job Activities		
• Practice making brief product presentations with your coworkers.	_____	_____
• List the key advantages of buying your organization's products and services compared to buying a competing product and service.	_____	_____
• Prepare a list of products and services that correspond to various customer needs. For example, when a customer expresses a need or concern about X (problem or need), the issue can often be resolved by offering Y (specific product or service).	_____	_____
• Set specific sales goals. For one month, use a daily calendar or planner and write down your sales goal for each day.	_____	_____
• Summarize and restate client requests.	_____	_____
• List three common sales objections and create strategies to address them.	_____	_____
• Identify a past customer objection that you were unable to overcome. Ask your manager and coworkers how they would have handled the objection.	_____	_____
Classroom/Courses		
• Attend monthly products and services update meetings.	_____	_____
• Attend the <i>Enhancing your Sales Skills</i> training course.	_____	_____
Self-Study		
• Review products and services material.	_____	_____
Other		
• Work with the manager to set sales goals.	_____	_____
_____	_____	_____
_____	_____	_____