Confidential Results

CareeR$_x$™ Developmental Report

Teller Assessment Program—Enhanced for Sales (TAP-Sales)

Results for:

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

CareeR$_X$

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

Suggested Developmental Priorities

Sales Focus — Identifying customer needs for bank products and services, matching products and services to those needs, and responding persuasively to customer questions and objections.

Recommended Activities for Sales Focus	To Be Completed By:	Completed:
On-the-Job Activities		
• Have supervisor monitor customer interactions, then review performance together	_____	___
• Summarize and re-state client requests and/or issues	_____	___
• Create and learn a list of needs associated with each product and service offered	_____	___
• Practice brief product presentations	_____	___
Classroom/Courses		
• Attend the *Counselor Salesperson* training class	_____	___
• Attend the products and services update meeting (held on the last Friday of each month)	_____	___
Self-Study		
• Read *Selling for Success*	_____	___
• Imagine you are a customer and decide what is important	_____	___
• Review bank material on product and service offerings	_____	___
Other		
• Work with supervisor to set sales goals	_____	___
• _____	_____	___
• _____	_____	___
• _____	_____	___
• _____	_____	___

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