



Individual Developmental Guide

For Sales Agent

Carlos Brown
Hunter Sales Model
With ABC Company, LLC.

April 25, 2025

Assessment Date: February 2, 2025

Talogy, Inc.
5700 Corporate Dr.
Suite 300
Pittsburgh PA 15237
Tel. 609 524 1400
info@calipercorp.com



ABOUT THIS REPORT

To find out more about how to interpret, understand, and apply the information in this report and to download a development plan template, we invite you to visit the [Caliper Essentials Individual Developmental Guide landing page](#).

If you have additional questions about this report or how to apply these results, please feel free to reach out directly to your Talogy Account Team or call (609) 524-1400.

JOB-FOCUSED BEHAVIORS: NATURAL STRENGTHS AND DEVELOPMENTAL OPPORTUNITIES

This section of the report highlights specific behaviors related to Hunter Sales roles that are likely to be natural strengths for you or that you should investigate, as they may pose developmental opportunities.

Natural Strengths

Performs work tasks before being asked or before the situation necessitates action (Initiating Action)

Why this is likely to be a strength

You are likely to tackle your work assignments without prompting, and you appear motivated to stay ahead of issues so you can head them off before they become problems. You seem proactive in responding to challenges and opportunities in the workplace.

Building on this strength

Leverage your proactive approach to task management when contributing to long-term or complex projects. Communicate what you envision the necessary steps are to reaching your goal and ensure that responsibilities are unanimously understood and delegated fairly.

Points for consideration and discussion

- What does performing work tasks before being asked mean to you, and how does it affect your success in this role? With your manager, discuss what might best help you to leverage this behavior.
- Reflect on a situation in which you took the initiative to act even though other key decision makers were not around. What was the issue, and what did you do to resolve it? What was the result? What did you learn from this experience?

Pushes forward to achieve a close (Influence and Persuasion)

Why this is likely to be a strength

You are apt to communicate with intent, and you are inclined to be mindful of your end goal when presenting information and working to influence people. You tend to derive satisfaction from gaining commitments and ultimately closing opportunities.

Building on this strength

You might consider simply asking your audience what it will take to gain a commitment. You might be closer to a "yes" than you think, and the additional insight you gain could allow you to adjust your style or offering in a way that will lead to the close more efficiently.

Points for consideration and discussion

- What does pushing forward to achieve a close mean relative to your role? In what ways do you display this behavior in your everyday work tasks? Discuss with your manager how it factors into your performance and what you can do to leverage this area.
- Reflect on a situation where you successfully convinced members of your audience to buy into your proposal. What techniques facilitated your success? What did you learn from the experience?

Works to convince others to support an idea (Influence and Persuasion)

Why this is likely to be a strength

Rather than simply sharing information, you are apt to communicate with others in a way that elicits buy-in for your initiatives and ideas. You seem motivated to use persuasive tactics when presenting solutions, and are likely to be a dynamic and compelling speaker. You seem able to influence others' thoughts and actions.

Building on this strength

When working to garner acceptance for your solutions and initiatives, be sure you are also providing sufficient detail regarding your recommendations. Doing so might help to sway individuals who are less likely to be influenced by your enthusiasm and may be more motivated by learning about the specifics behind your ideas.

Points for consideration and discussion

- What does persuasively selling ideas mean to you in your role? How are you currently exhibiting this behavior in your work? Discuss with your manager what specific projects or goals would best help you leverage this behavior.
- Think about a time when you needed to influence the actions of others in a desired direction. Please provide some background on the situation, the stakeholders, and your relationships with them. What specific methods did you use to make your message compelling? What would you do differently if you had the chance?

Strives to exceed goals, targets, and standards (Achievement Motivation and Perseverance)

Why this is likely to be a strength

You are inclined to go above and beyond what's required when assigned tasks or objectives. Rather than simply meeting standards, you appear motivated to push yourself further in an effort to exceed expectations.

Building on this strength

Use your drive to challenge others to set more aggressive goals for themselves and the team. Don't be reluctant to publicly vocalize your desire to exceed expectations and demonstrate achievement beyond what has been instructed. Providing additional detail about your efforts might provide others with a better idea about how they can exceed standards, as well.

Points for consideration and discussion

- What does striving to exceed goals, targets, and standards mean to you in relation to your role? How do you exhibit this behavior in your day-to-day work tasks? Discuss with your manager how it contributes to success in your position and other ways you might leverage this behavior.
- Consider a time when you stretched yourself to achieve a professional accomplishment that required you to go above and beyond expectations. What made this satisfying for you? What difficulties or obstacles did you encounter during the process, and what did you do to persevere and overcome these challenges? What did you learn from this experience?

Developmental Opportunities

May allow their emotions to influence reactions, instead of remaining composed throughout challenging interactions (Composure and Resiliency)

Why this might be a developmental opportunity

When challenged by interpersonal conflicts, you might struggle to keep your emotions in check. Rather than responding in a calm fashion, you might find that you inadvertently escalate, rather than defuse, difficult situations.

This could be a challenge for you...

When you experience	So, instead of	Consider
<ul style="list-style-type: none"> Disagreements, challenges, or conflict Rising emotions in yourself or others Interactions with colleagues who are visibly upset 	Letting your emotions take hold, potentially allowing anxiety or frustration to affect what you're saying or how you are conveying it	Thinking ahead of time about the message you want to convey, what types of responses you might anticipate, and how to handle them in a logical, calm way

Developmental suggestions

- Emotional reactions to situations can take over the rational part of your brain and can lead to unintended outcomes that you may not be able to take back. When you feel a strong negative emotion coming on, make every effort not to respond in that moment and take time to think about the situation that has been presented to you that is causing you to not maintain your composure. Emotions can take a while to cool down and give you back access to your rational self, so offer a response the following day if possible. You can also stop and ask yourself, "is it truly worth it to say what I'm about to say (or do what I'm about to do)?" before taking your action. The answer is usually "no" in these types of situations.
- Work with your manager to develop effective strategies that you can use during challenging or emotional interpersonal situations. Common strategies include pausing before replying, asking open-ended questions, and admitting feelings of stress to the other party. Role-play future interactions that may be stressful, and seek feedback following such interactions.

With your manager

- What does staying composed in challenging interpersonal situations mean to you in your role? How are you currently exhibiting this behavior in your work? Discuss with your manager what specific projects or goals could help you leverage this trait.
- Think about a time when you faced adversity from a colleague or supervisor. What planning steps did you employ to ensure a positive resolution? What was the outcome? What were the long-term effects on the relationship? What did you learn from the experience?

May allow the stress of an unexpected complication or change to impact the ability to respond constructively (Composure and Resiliency)

Why this might be a developmental opportunity

You might feel stress or rising emotion when you encounter unexpected complications during the course of an assignment. You could have difficulty making the adjustments needed to respond to issues as they arise, as you might find it challenging to address interruptions while remaining focused on your initial or larger goal.

This could be a challenge for you...

When you experience	So, instead of	Consider
<ul style="list-style-type: none"> • Surprise changes that impact your project or work plan • Challenges or difficulties you did not foresee or contingencies you did not plan for 	<p>Allowing yourself to give in to stress and become emotional when new problems are thrown at you or unanticipated issues disrupt your schedule</p>	<p>Building a certain amount of time into every day dedicated to responding to any crises that might arise; if none do, you can instead use it for responding to e-mails, doing additional learning, or building rapport with your co-workers</p>

Developmental suggestions

- When problems arise or projects take an unplanned turn, show patience and invest a few minutes in reordering your priorities instead of following tangents and losing track of the main objective. You can also prepare contingency plans ahead of time, making sure to get input from knowledgeable people about the types of issues that sometimes cause complications. Ensuring you have access to expert resources or simply to team members who are willing to pitch in and help would be advantageous as well.
- Try to pause before reacting to unexpected complications. Quite often, initial reactions are charged with anxiety and are not always productive. Challenge yourself to identify opportunities to be constructive when responding to unforeseen circumstances. Ask yourself, "What can I learn from this setback?"

With your manager

- What does responding constructively to unexpected complications mean to you, and how is it relevant to your role? Discuss with your manager how this behavior affects your success and what might assist you to leverage it.
- Think about a time when you encountered unexpected complications when working on a high-impact project. What did you do to ensure your response was constructive? How did you have to alter your plans, and what impact did that have on the overall project? What did you learn from this experience, and how have you applied those lessons?

May use methods that appeal to emotion and excitement of the audience rather than logic and facts when presenting an argument (Influence and Persuasion)

Why this might be a developmental opportunity

Too often, you might rely on the sheer strength of your communications to prove your point. You may not consistently provide sufficient supporting data to back up your claims. As a result, your persuasive attempts may seem lacking in fact and preparation.

This could be a challenge for you...

<i>When you experience</i>	<i>So, instead of</i>	<i>Consider</i>
<ul style="list-style-type: none"> • A dispassionate audience • Individuals who are not swayed by your enthusiasm 	Relying on generating excitement or eliciting a reflective response to your enthusiasm	Taking the time to consider what facts or data are needed to support your argument and then creating the flow of your presentation with a specific scheme in mind

Developmental suggestions

- Think about what your audience cares about and what is most important to them and then structure your presentation around that theme. It may be helpful to diagram your presentation to see how it flows from opening to close. Practicing with a colleague could help you review material and give you ideas on how best to organize your thoughts.
- Anticipate and plan for the types of resistance you might encounter when trying to gain support for your recommendations. Ensure that you think through a logical way to make your argument, gather supporting facts and details in advance, communicate your prepared facts and the selling points, and reaffirm your views if opposed.

With your manager

- What does using logic and facts to make a compelling argument mean to you, and how is it relevant to your role? Discuss with your manager how this behavior affects your success and what might assist you in performing it more consistently.
- Assess a time when you needed to communicate the value of a product, service, or solution within the framework of a client's priorities, goals, and budget. How did you ensure that you targeted the specific needs of the situation, and what might you have done to enhance your efforts?

Might approach collaboration with the intent to achieve a predetermined objective rather than engage in a give-and-take partnership (Relationship Building)

Why this might be a developmental opportunity

You might prefer to work independently and might not be motivated to foster and manage relationships with key contacts. You may not look for opportunities to partner with others, which could impede your ability to foster long-term alliances.

This could be a challenge for you...

When you experience	So, instead of	Consider
<ul style="list-style-type: none"> Projects or initiatives with unfamiliar collaboration partners Potential allies or partners with varying skills, perspectives, or personalities 	Focusing mainly on the task at hand, to the possible exclusion of others' perspectives	Taking into account the overall value of the relationship to the business, rather than just in relation to the current task, and ensuring you get to know people in order to facilitate future work

Developmental suggestions

- To gain another's trust requires time and may require you to take the initiative to demonstrate your ability to understand their needs and prove your value as a problem solver. Putting in such efforts could help you build credibility as a resource and establish a collaborative relationship.
- Work with your manager to determine the most important partnerships for you to build, whether those partnerships be with colleagues in other departments or personnel outside the company. Make a concerted effort to get to know these people one on one by making calls, having meetings or informal discussions, asking questions, and identifying areas of common interest. In addition, continue to check in with these individuals on a regular basis in order to keep the lines of communication open and build strong alliances.

With your manager

- What does building collaborative alliances mean to you, and how is it relevant to your role? Discuss with your manager how this behavior affects your success and what might assist you in performing it more consistently.
- Think about a recent project where cross-functional collaboration was pivotal to success. Consider your relationships with the other stakeholders and your approach to working with the group. What impact did the group dynamics have on your efforts? What worked, and what didn't?

LEVERAGING YOUR WORK STYLES

The previous portion of your report targeted behaviors specifically related to your job. Here, we will help you make the most of your natural work styles in different situations.

COMMUNICATION

Your Communication Style

- **Preferred Communication Approach**

Taking a direct, commanding approach and being up front and candid when imparting information and conveying expectations

- **Communication Strengths**

Bringing clarity of purpose and prompting others to move tasks and projects toward completion

- **Potential Communication Stress Reactions**

Directing or telling in a seemingly arbitrary and/or forceful manner

- **When you notice yourself reacting to stress, try the following:**

Ask questions to ensure consideration of others' needs, feelings, and perspectives

Tips to build your Communication skills

- Ask others to share their opinions before you make a decision. Take the time to listen and consider their suggestions, thank them for sharing and incorporate their suggestions when it makes sense to do so, and give them credit for their contributions.
- Create a safe environment that encourages others to participate. Pay attention to your actions to ensure that you are not dominating the conversation.

Strengths to leverage to improve your Communications with others

- Be objective, direct, and concise when providing feedback.
- Use a logical, organized approach to explain feelings or values.

Tips for working with your manager to develop your Communication skills

- Be mindful of when behaviors are creating the perception of closed-mindedness. Partner with your manager to explore different viewpoints by asking questions and practicing effective listening skills.
- When others communicate their issues, you may want to jump to providing solutions. This can cause behaviors such as interrupting and finishing others' sentences. Work with your manager to learn how to take the time to ask clarifying questions and be comfortable exploring the key issue.

INTERPERSONAL DYNAMICS

Your Interpersonal Style

- **Preferred Interpersonal Approach**

Leveraging relationships and/or personal influence in frequent interactions

- **Interpersonal Strengths**

Bringing a sense of direction and a drive toward results

- **Potential Interpersonal Stress Reactions**

Becoming argumentative or controlling

- **When you notice yourself reacting to stress, try the following:**

Check in with a calming influence who can help you step back and look at things from different perspectives

Tips to build your Interpersonal skills

- Your strong interpersonal style can stifle the creativity of others if overused. Use open-ended questions when working with others.
- It can be easy for others to get lost in the details in a group meeting. Take time to explore the big picture as well as any context issues to help the group move forward.

Strengths to leverage to improve your interactions with others

- You show a tendency to drive the completion of tasks and projects. Leverage this inclination to help others remain focused on achieving objectives.
- Your pragmatic style can help influence others to move from theoretical ideas to practical application.

Tips for working with your manager to develop your Interpersonal skills

- Ask for help from your manager on how to empower others as appropriate. By empowering others, you can develop your own leadership skills as well as enable others to grow as leaders too.
- If you are facing highly emotional situations, work with your manager on how to manage and respond to the emotions of others.

PROBLEM SOLVING AND DECISION MAKING

Your Problem-Solving Style

- **Preferred Decision-Making Approach**

Recognizing the emotional impact of a decision on self and others; Avoiding mistakes

- **Decision-Making Strengths**

Accounting for the emotional side of a situation; Minimizing the negative impact of decisions

- **Potential Decision-Making Stress Reactions**

Making decisions based on emotional bias; Deferring a decision, asking for permission, or searching for reassurance

- **When you notice yourself reacting to stress, try the following:**

Take a step back to remain calm and check in with a resource who can help you remain objective; Make a "what if" plan before moving forward

Tips to build your Decision-Making skills

- Ask others to help to define logical consequences of major decisions and for recommendations on what to pay extra attention to when exploring alternatives.
- Recognize when a difficult or risky decision may be necessary in order to move forward. Weigh the pros and cons and mitigate risks as much as possible by creating contingency plans.

Strengths to leverage to improve your Decision Making

- Leverage your strengths to identify the social benefits of a decision. Others can leverage this information to help influence people for quicker adoption.
- Share your thoughts throughout the decision-making process to ensure that the team isn't making changes for change's sake. The current approach may not be exciting, but it may still be the best. This can be overlooked when there is a desire for something new.

Tips for working with your manager to develop your Decision-Making skills

- Ask for assistance from your manager to help you define realistic, win/win strategies.
- If you feel hesitant to make tough decisions, ask your manager to provide examples of how tough decisions ultimately helped others in the long-term.

PERSONAL ORGANIZATION AND TIME MANAGEMENT

Your Prioritization Style

- **Preferred Prioritization Approach**

Focusing on comprehensive planning and efficient multitasking; Thinking through all of the steps in a process without overlooking details

- **Prioritization Strengths**

Planning and introducing structure and process; Reviewing work for correctness and providing detailed analysis of options or ideas

- **Potential Prioritization Stress Reactions**

Showing reluctance to adapt to changing circumstances; Getting stuck in the details to the point of inaction

- **When you notice yourself reacting to stress, try the following:**

Remain open to slowing down to fully explore all of the options for project execution; Request clarification on where to focus your efforts when working under tight deadlines or on multiple projects concurrently

Tips to build your Prioritization skills

- Stay open to new data, approaches, and options, even if the alternatives may take more time to implement.
- Be careful to not get too involved with details that you lose focus or don't recognize the overarching threats or needs.

Strengths to leverage to improve your Prioritization skills

- Your desire to identify opportunities to provide structure can help the team improve its overall efficiency.
- Continue to help the team explore in detail, the options and ideas that are in front of them. Your insights will enable others to make the most informed decision possible.

Tips for working with your manager to develop your Prioritization skills

- When prioritizing work, partner with your manager to realistically describe concrete, practical issues that the team is facing and how best to confront these issues sooner than later.
- At times, you can appear to be closed to change. Explore with your manager how well-thought-out changes can help improve overall efficiency.

FOR FURTHER LEARNING

You can also use this report to create a personalized learning path based on your unique Caliper Profile results. To help you become more effective in the behaviors discussed in this report and within your organization overall, consider seeking out additional learning on the following competencies associated with those behaviors:

- **Composure and Resiliency**
- **Influence and Persuasion**
- **Relationship Building**

JOINT ACTION PLAN

Now that you have feedback from a coach, mentor, or manager and ideas for development, work together to create an action plan for the behavioral changes you would like to make.

For more information about filling out your Joint Action plan and to get an interactive PDF copy, please visit the [Caliper Essentials Individual Developmental Guide landing page](#).

[Please click here to download your interactive Joint Action Plan.](#)