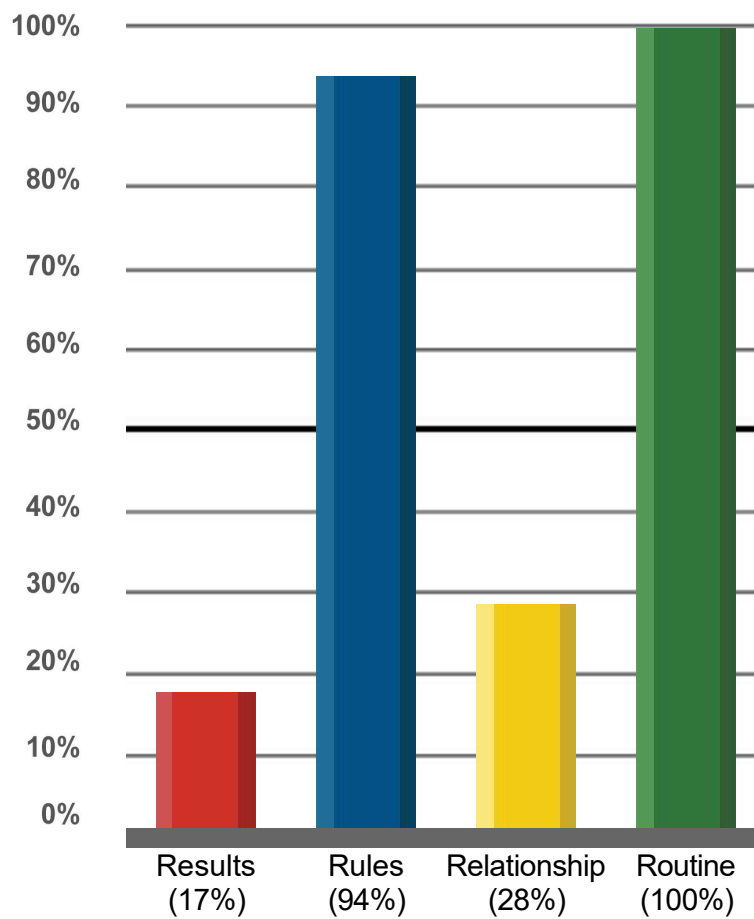




Producer Insights™ Report for: ABC Financial Advisors

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Jill's Profile Graph



RESULTS	RULES	RELATIONSHIPS	ROUTINE
Decisive	Balanced Judgment	Sociable	Stable
Responsive	Accurate	Optimistic	Steady
Competitive	Neat	Convincing	Relaxed
Strong Willed	Careful	Warm	Consistent
Ambitious	Tactful	Enthusiastic	Patient
Determined	Systematic	Magnetic	Resistant to Change

ROUTINE (100%)

ROUTINE - Jill finds energy with ROUTINE. Her routine gives her peace and stability. Jill likes to play the supporting role to others. She tends to remain quiet in conversations and will only speak when spoken to. Jill will avoid conflict whenever possible. She may be seen as passive-aggressive in her actions. Getting into her "inner circle" may take time, but once you are in, you will be seen as a trusted source. Family and those in the "inner circle" are of great value to Jill. In fact, she will frequently put their needs before her own. Jill moves at a very slow pace and will not be pressured. If she feels pressured, you will not be confronted, but she will quietly wait for a safe opportunity to leave the situation. Jill prefers to follow the course others have traveled before her instead of being the pioneer. Change will be very difficult for her.

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RULES (94%)

RULES: Jill finds energy in following and enforcing the RULES. She will be very competent and compliant in almost every situation. Details and thoroughness are gifts that Jill possesses. Beware, because she will use those gifts to find the flaws in your arguments. Jill feels rules were written for a reason and they should be followed. She will want to know the rules, review the agreements in detail and will have a list of questions to be answered. She will not be taken in by emotion, charm or pressure. She will look for the facts and the facts alone. She is likely to make a "pros" and "cons" list to help make decisions. The more information she has, the more likely she is to make a decision. Jill may come across as somewhat distant or evasive until she trusts you. Be the expert she can depend on. She craves systems and processes, especially when those processes reveal data she considers to be important to help her make a decision. She will not be rushed through the process, and may suspect a sinister motive if she feels pressure from you. Proper protocol is critical to Jill. "Special rates" or "deals" will not appeal to her. Nor will personal banter. Take time to show her the facts. The calculated effort and opportunity will help Jill be comfortable with a particular plan.

Based on her responses, Jill is likely to have a communication style which lends to the following characteristics. Utilize the following suggestions to make a strong connection with her.

	ROUTINE (100%)	RULES (94%)
Key Focus	Routine - Maintaining the plan is critical. Change is not easy. Spend time connecting and building the relationship before plunging into business discussions.	Identifying Reality - Jill will go to great lengths to gather, analyze, and test information and alternatives.
Strategy	Lose/Win - Jill may put others' needs before her own. It is important for you to help her be loyal to herself. Let her know that she deserves to win too. Be a leader and allow Jill to join your team.	Win through Work - Jill will not be pushed or rushed. She will have questions and maybe even little "tests" for you to verify your knowledge and expertise. Do your homework and know your stuff as there may be big opportunities with this style.
Mindset	Peaceful - Keeping peace and stability are critical. Jill is not interested in being a trailblazer. Help her understand what many others in this situation have done.	Always Right - Jill likes to be right and she usually is. She has done her homework. Do not give your standard sales pitch unless it is flawless. This style loves to catch inconsistencies in your assertions and can quickly lose respect for you.
Biggest Asset	Support - Jill loves to support people in general. She tends to have great listening skills and can be a strong referral source for additional business.	Perfection - Jill loves things to be right and perfect. She will go to great lengths to complete a task perfectly. This can sometimes be a detriment as it may not be completed in a timely manner.
Making a Change	Change is Difficult - Jill may stay in a bad situation for far too long. Help her become loyal to herself. If you detect a poor situation, never attack the advisors, only attack the advice they are giving.	Analysis - This style will analyze and study before agreeing to a change. Sometimes it may not be the numbers as much as what they feel is the right thing to do.
Strokes and Compliments	Not a great receiver of compliments - Focus on how they have contributed to the team, the family or their group. Leaving a legacy and	Acknowledge their time and effort. This style takes great pride in doing the work and achieving the goal through substantial effort.

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Adapting Your Style to Suit Jill

ROUTINE (100%)

Based on Jill's responses, here are some quick adaptations to make when dealing with her:

Begin conversations with personal comments about family and be genuinely interested in Jill's responses. Take time to understand what Jill holds most dear in her life. Your ability to impact that may be more important to Jill than the impact you have on her directly.

Be very slow and deliberate with your conversation. Pause every now and then to ask Jill if she agrees with the assertions you just made, before you move on. She may otherwise keep her disagreement to herself.

Include comforting reassurances when communicating with Jill. Use variations of the phrase "What most people do in your situation is...," to help Jill understand that she is not doing anything pioneer or new.

Focus your efforts on helping Jill understand how doing business with you benefits her family and has a lasting effect on the future.

RULES (94%)

Based on Jill's secondary style, you may want to also consider these adaptations when talking with her:

Take some time to establish a clear agenda for every meeting and then stick to the ground rules you have laid out. Feel free to assert the training and education which have led to your level of competency.

Keep your emotions under wraps and focus on the facts in order to gain trust. Keep your pace slow and be prepared. Let Jill know that you play by the rules and will follow through with any promises you make.

Be understanding of Jill's desire to verify the information you present. Jill may need some time to do her homework. Allow her that time, but only with a clear "next step" to reengage.

Jill is probably a perfectionist and with good reason. Avoid confrontation when she has taken a stance on an issue, because challenging or criticizing that decision will not usually benefit you.

NOTES



Motivating Jill

ROUTINE (100%)

Based on Jill's responses, here are some ways to elicit action from her:

Focus your comments on the safety and security aspects of doing business with you. Highlight "guarantees" or other stability aspects of a particular solution.

Make it easy to do business with you. Jill will appreciate you taking all the pressure off the decision to move forward.

Show solutions which have worked for others in the past and demonstrate why those outcomes are likely to occur again.

Allow Jill to "help you" by moving forward today, but allow her an "out-clause" so that the pressure of a final decision is removed.

RULES (94%)

You may also want to keep these motivations in mind based on Jill's secondary style:

Present your solutions in a logical, linear, step-by-step manner and provide the documentation to prove your assertions. Allow Jill time to sort through the material.

Position yourself as the sought-after expert and stay emotionally detached from the transaction. Be precise and use probabilities when a hard date is not available.

Go the extra mile to prove your worth and knowledge to earn Jill's respect. Play by the rules and maintain slow and steady progress through an established agenda.

Utilize spreadsheets or computer programs to highlight actual benefits or reasons to move forward, but avoid pressure tactics and artificial timelines.

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To Slow Down Your Pace:

- Talk, walk and make decisions more slowly
- Ask Jill her opinion and acknowledge it
- Share the decision-making process
- Allow for alternatives and Utilize Generalities
- Soften Your Tone, Do Not Interrupt
- Refrain from Criticism, Challenge, or Pushiness
- Choose Your Words Carefully when Disagreeing

To Stay Oriented on People:

Share your Feelings, Show your Emotion

Respond to the Expression of other's Feelings

Compliment Jill Personally

Find Common Interests, Develop the Relationship

Loosen Up, Use Motion and Gestures

Be Willing to Digress from the Agenda

To Stay Oriented on the Task:

Get Right Down to Business – Bottom Line

Stay Logical and Factual

Stick to the Agenda and the Topic of Discussion

Do Not Waste Jill's Time

Downplay Your Enthusiasm and Body Movement

Stick to the Agenda – Stay on Topic

Do Not Initiate Physical Contact

NOTES

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