

# **Financial Services Attribute Index™**

Innermetrix, Inc.  
Innermetrix Talent Profile of John Dough

## Patterns Overview

Over fifty years of scientific research has revealed that there are three distinct styles of decision-making. Each of us can make decisions in these three ways, but we tend to develop a preference for one more than the other two. This preference becomes a subconscious force, affecting the decisions we make on a daily basis and shaping how we perceive the world around us and ourselves.

The three decisional styles are the personal, the practical, and the analytical. These dimensions can be examined in the form of patterns due to the work of Dr. David Mefford and his characterology research on axiology and personality types (Mefford, et.al, 1980). Dr. Mefford worked out a system of patterns based on two distinct factors unique to axiology. His research focused on the clarity patterns, which we have expanded upon.

**The Personal Style:** People with a preference for this style of making decisions tend to see the world from a personal point of view, or with concern for the individuals involved. They see people in a unique, individual light and are more concerned about others than the results and theory. This involves a personal involvement with, concentration on, or investment in people. To this style, the world is filled with people needing to be understood.

**The Practical Style:** People with a preference for this style of making decisions tend to see things in very practical, no nonsense, real-world, task oriented manner. They are more concerned with results than others and theory. They see people in comparative ways as they relate to others. To this style, the world is an objective waiting to be achieved.

**The Analytical Style:** People with a preference for this style of making decisions tend to see the world from a theoretical perspective, more in an abstract way than a concrete one. They see people as part of a system and tend to think in very black and white terms. They are more concerned with thinking about things, and analysis than actual results or personal concerns of others. To this style, the world is a problem to be explored and solved.

To some extent we are all capable of making all three kinds of decisions, but our preference tends to be for one more than the other two. Here's a simple example of the three in contrast to each other. One of each style are sitting around a table trying to figure out what to do. While the Personal style is focused on the needs of the workers involved and how best to utilize their talents, the Practical doesn't really care as much about the personal needs, or if it is done right, he just wants to get it done. Finally there is the Analytical who sees no reason to worry about the people involved or even getting it done if it isn't going to be done correctly.

We all have different balances of these three styles; that's what makes our decisions and actions different from each other's. These ways of making decisions, and how we use them, are at the core of who we are. They are behind our preferences, our strengths, and our weaknesses. In the following pages you will find a list of capacities which are the result of your unique combination of these three decisional styles. It is this understanding of your individual strengths and weaknesses that will enable you to affect change in your life and achieve greater personal success. It is only by first understanding something that we are then able to change it.

## Efficient S=E>I (H)

### External Decision Making Pattern Summary

Your external clarity pattern indicates that you are someone who focuses on the efficiency in situations. Although you are good at understanding people and being empathetic, this is not your highest strength. Efficient organization and completion of objectives, and of the work function in particular, are where you place the most attention much of the time. Individual personal needs or values are important, but even more important to you are performance or organizational needs. You are very good at big picture thinking (planning it) and street level operations (getting it done). You are practical and responsible, and you enjoy working in a structured environment with challenging roles. Overall development level in the Systems and Tasks dimensions is equal and high, while the People dimension has moderate development, but is under developed in comparison. Level of development speaks to your ability to "see" a specific dimension. The more clearly we see a dimension of thought, the more able we are to use it; therefore the better we are at it.

### Maximizers

Efficient and productive organization and fulfillment of work  
Conceptual thinking  
Organizing  
Schematic and or detail oriented thought  
30,000 foot views

### Minimizers

Communication and people skills  
Human awareness  
Balancing people needs with organizational and objective needs

### Motivators

Responsibility to authority  
Status and recognition  
Sense of belonging

### Needs for Growth

Better people awareness and possibly the development of communication skills. Keeping people's individual needs as highly valued or as important as that of the other dimensions of thinking.

### Targets for Reinforcement (R) and Development (D)

Empathetic outlook (D)  
Understanding attitude (D)  
Attention to detail (R)

### Preferred Environment

Clearly defined responsibility and relationship with authority; goal-oriented production. Management of process oriented outcomes more so than human development responsibility.

## Self-Actualizing I=E=S (M)

### Internal Decision Making Pattern Summary

The medium self-actualized clarity pattern is ideally balanced. Although all three dimensions are balanced very well, all three of them are in the 66th percentile of potential development. You are completely balanced between valuing yourself for your own true unique abilities and worth, your role/s in life and the way in which you carry out those roles now and in the future. You possess a good internal source of energy or strength. Your abilities for self-esteem, handling stress, remaining committed, being persistent and having results orientation are good. You are probably comfortable in a wide variety of situations, both social and business. Your overall level of development for the People, Tasks and Systems dimensions is moderate. Level of development speaks to your ability to "see" a specific dimension. The more clearly we see a dimension of thought, the more able we are to use it; therefore the better we are at it.

### Maximizers

Good sense of self ability  
Generous, easy going, dependable  
Good self awareness  
Good role appreciation  
Good problem management

### Minimizers

Trouble with getting easily bored with status in life that fails to challenge all three dimensions of thought personally  
Overall level of development in all three core areas  
Self assessment  
Personal commitment  
Sense of mission

### Motivators

Self improvement  
Material possessions  
Sense of mission

### Needs for Growth

To increase your clarity scores for each of the three dimensions of thought.

### Targets for Reinforcement (R) and Development (D)

Self esteem (D)  
Role awareness (D)  
Self direction (D)

# Financial Services Attribute Index Summary

## Report Summary

This graph summarizes the 8 categories that comprise this Innermetrix Talent Profile. A description and mean score for each category is on the following page. This profile is based on the results a research study on over 500 financial service professionals from the five big houses which was conducted in 2005

## Report Component Graphs

### Communicating with Customers



### Critical Sales Attributes



### Decision Making



### Goal achievement



### Integrity and Trust



### Planning and Organizing



### Problem Solving Capacity



### Self Starting Ability



John Dough

# Category Overviews

## Communicating with Customers (7.9)

John's ability to listen to, and respond to, the customer in an objective, efficient and professional manner.

## Critical Sales Attributes (7.4)

These 10 attributes are the most critical for success as a sales professional. While there are many attributes that impact an individual's success in sales, these have been found to be the most critical ones. They form the core foundation for top sales performance, and without them it will be very difficult to succeed in most sales jobs.

## Decision Making (8.5)

"Is John an effective planning and organizer?" This category measures John's conceptual abilities and how he applies them to organizing and setting direction. These include: long-range planning ability, concrete organizing, proactive thinking and being able to see the big picture.

## Goal achievement (9.1)

"What capacities does John possess which aid him in achieving his goals?" John's ability to make accurate and appropriate decisions in his quest to accomplish a task or objective. The capacities measured in this category are his ability for theoretical problem solving, his overall problem solving ability, long-range planning capabilities and his ability for conceptual thinking.

## Integrity and Trust (8.7)

This category looks at the level of accountability John has for the policies, and personal needs of those he is working for both company and client.

## Planning and Organizing (8.5)

"Is John an effective planner and organizer?" This category measures John's conceptual abilities and how he applies them to organizing and setting direction. These include: long-range planning ability, concrete organizing, proactive thinking and being able to see the big picture.

## Problem Solving Capacity (8.9)

The ability to see and understand the crucial issues in a problem situation and to then identify workable solutions.

## Self Starting Ability (7.5)

"Does John motivate himself, or require an outside push?" Self starting ability measures John's ability to find his own motivation for accomplishing a task, and the degree to which he will maintain that course in the face of adversity. It involves his project/goal focus, his persistence and his initiative.

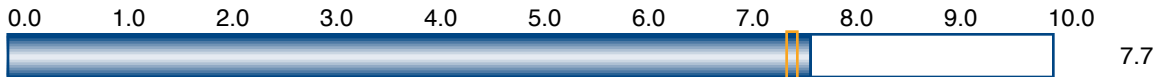
# Communicating with Customers

## Category Description

John's ability to listen to, and respond to, the customer in an objective, efficient and professional manner.

## Category Component Graphs

### Evaluating What Is Said



### Human Awareness



### Sense of Timing



### Surrendering Control



### Understanding Attitude



## Category Component Descriptions

### Evaluating What Is Said (7.7)

evaluates John's openness toward other people and his willingness to hear what others are saying, rather than what he thinks they should say or they are going to say.

### Human Awareness (7.9)

evaluates John's ability to be conscious of the feelings and opinions of others; and to value others as people instead of just as their organizational role or value.

### Sense of Timing (8.6)

evaluates John's ability to evaluate a situation in such a way that statements, decisions, and actions are the most effective, accurate, and timely.

### Surrendering Control (7.3)

evaluates John's ability to surrender control of a given situation or outcome to another person or a group of people.

### Understanding Attitude (7.9)

evaluates John's ability to read between the lines and to understand body language, reticence, stress, and emotions.

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# Critical Sales Attributes

## Category Description

These 10 attributes are the most critical for success as a sales professional. While there are many attributes that impact an individual's success in sales, these have been found to be the most critical ones. They form the core foundation for top sales performance, and without them it will be very difficult to succeed in most sales jobs.

## Category Component Graphs

### Enjoyment Of The Job



### Handling Rejection



### Handling Stress



### Persistence



### Personal Accountability



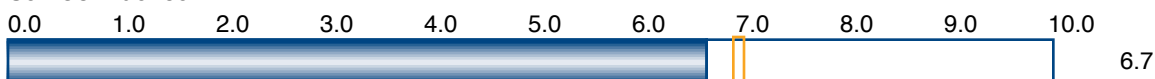
### Personal Commitment



### Results Orientation



### Self Confidence



### Self Discipline and Sense of Duty



### Self Starting Ability



## Category Component Descriptions

**Enjoyment Of The Job (6.9)**  
evaluates the degree to which John feels that his job is fulfilling, rewarding, and results in a positive and useful benefit.

**Handling Rejection (7.6)**  
evaluates John's ability to avoid taking rejection or criticism in an overly personal manner.

**Handling Stress (6.7)**

evaluates John's ability to balance and to defuse inner tensions and stresses, which if allowed to build up, might interfere with his ability to perform up to his potential.

**Persistence (7.3)**

evaluates John's ability to stay on course in times of difficulty.

**Personal Accountability (8.0)**

evaluates John's ability to be responsible for the consequences of his own decisions and actions, and not shift the focus or blame for poor performance to somewhere else or on others.

**Personal Commitment (7.0)**

evaluates John's ability to focus and to stay committed to a task: a measure of his internal, personal commitment.

**Results Orientation (9.3)**

evaluates John's ability to identify the actions necessary to complete tasks and to obtain results.

**Self Confidence (6.7)**

evaluates John's ability to develop and to maintain inner strength based on the desire to succeed and on his belief that he possesses the capabilities to succeed.

**Self Discipline and Sense of Duty (6.9)**

evaluates how strongly John feels the need to be consistent and true to himself in his actions.

**Self Starting Ability (7.9)**

evaluates John's ability to find his own motivation for accomplishing a task and the degree to which he will maintain that course in the face of adversity.

# Decision Making

## Category Description

"Is John an effective planning and organizer?" This category measures John's conceptual abilities and how he applies them to organizing and setting direction. These include: long-range planning ability, concrete organizing, proactive thinking and being able to see the big picture.

## Category Component Graphs

### Balanced Decision Making



### Conceptual Thinking



### Role Confidence



### Theoretical Problem Solving



## Category Component Descriptions

### Balanced Decision Making (7.9)

evaluates John's ability to be objective and to evaluate fairly the different aspects (people and other) of a situation; and his ability to make an ethical decision that takes into account all aspects and components.

### Conceptual Thinking (9.3)

evaluates John's ability to see the big picture and then to determine which direction to take, and how resources should be used to attain future goals.

### Role Confidence (6.9)

evaluates John's ability to develop and to maintain an inner strength based on the belief that he will succeed.

### Theoretical Problem Solving (10.0)

evaluates John's ability to envision a situation and to then apply his Problem Solving Ability.

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# Goal achievement

## Category Description

"What capacities does John possess which aid him in achieving his goals?" John's ability to make accurate and appropriate decisions in his quest to accomplish a task or objective. The capacities measured in this category are his ability for theoretical problem solving, his overall problem solving ability, long-range planning capabilities and his ability for conceptual thinking.

## Category Component Graphs

### Conceptual Thinking



### Long Range Planning



### Problem Solving



### Theoretical Problem Solving



## Category Component Descriptions

### Conceptual Thinking (9.3)

evaluates John's ability to see the big picture and then to determine which direction to take, and how resources should be used to attain future goals.

### Long Range Planning (7.5)

evaluates John's ability to identify and to evaluate resources and to plan for their utilization throughout the execution of comprehensive, long-range projects.

### Problem Solving (9.5)

evaluates John's ability to identify alternative solutions to a problem and to select the best option.

### Theoretical Problem Solving (10.0)

evaluates John's ability to envision a situation and to then apply his Problem Solving Ability.

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# Integrity and Trust

## Category Description

This category looks at the level of accountability John has for the policies, and personal needs of those he is working for both company and client.

## Category Component Graphs

### Attitude Toward Honesty



### Balanced Decision Making



### Respect For Policies



### Respect For Property



## Category Component Descriptions

### Attitude Toward Honesty (8.4)

evaluates John's openness to being honest even when it involves reporting his own lack of results, or the dishonesty of others.

### Balanced Decision Making (7.9)

evaluates John's ability to be objective and to evaluate fairly the different aspects (people and other) of a situation; and his ability to make an ethical decision that takes into account all aspects and components.

### Respect For Policies (9.3)

evaluates John's appreciation for the value of conducting business affairs according to the intent of company policies and standards.

### Respect For Property (9.3)

evaluates John's ability to see and appreciate the value of protecting and using company property correctly.

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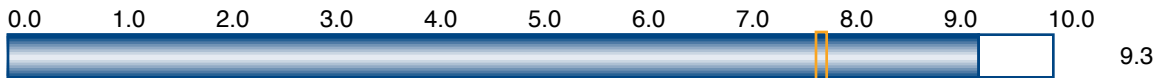
# Planning and Organizing

## Category Description

"Is John an effective planner and organizer?" This category measures John's conceptual abilities and how he applies them to organizing and setting direction. These include: long-range planning ability, concrete organizing, proactive thinking and being able to see the big picture.

## Category Component Graphs

### Conceptual Thinking



### Concrete Organization



### Long Range Planning



### Proactive Thinking



## Category Component Descriptions

### Conceptual Thinking (9.3)

evaluates John's ability to see the big picture and then to determine which direction to take, and how resources should be used to attain future goals.

### Concrete Organization (9.3)

evaluates John's understanding of the immediate, concrete needs of a situation and to establish an effective plan of action for meeting those needs.

### Long Range Planning (7.5)

evaluates John's ability to identify and to evaluate resources and to plan for their utilization throughout the execution of comprehensive, long-range projects.

### Proactive Thinking (7.7)

evaluates John's ability to determine the future implications of current decisions and actions.

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# Problem Solving Capacity

## Category Description

The ability to see and understand the crucial issues in a problem situation and to then identify workable solutions.

## Category Component Graphs

### Attention To Detail



### Integrative Ability



### Intuitive Decision Making



### Problem and Situation Analysis



### Problem Solving



### Using Common Sense



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## Category Component Descriptions

### Attention To Detail (9.3)

evaluates John's ability to see and to pay attention to details.

### Integrative Ability (10.0)

evaluates John's ability to identify the elements of a problem situation, to understand which components are critical, and to decide what to do.

### Intuitive Decision Making (7.3)

evaluates John's ability to accurately compile intuitive perceptions about a situation into a decision or action.

### Problem and Situation Analysis (9.9)

evaluates John's ability to identify the elements of a problematic situation and to understand which components are critical.

### Problem Solving (9.5)

evaluates John's ability to identify alternative solutions to a problem and to select the best option.

### Using Common Sense (7.4)

evaluates John's ability to focus on practical thinking, to see the world clearly, and to make common sense decisions.

# Self Starting Ability

## Category Description

"Does John motivate himself, or require an outside push?" Self starting ability measures John's ability to find his own motivation for accomplishing a task, and the degree to which he will maintain that course in the face of adversity. It involves his project/goal focus, his persistence and his initiative.

## Category Component Graphs

### Initiative



### Persistence



### Personal Commitment



### Personal Drive



### Project and Goal Focus



## Category Component Descriptions

### Initiative (7.8)

evaluates John's ability to direct his energy toward the completion of a goal without an external catalyst.

### Persistence (7.3)

evaluates John's ability to stay on course in times of difficulty.

### Personal Commitment (7.0)

evaluates John's ability to focus and to stay committed to a task: a measure of his internal, personal commitment.

### Personal Drive (7.8)

evaluates how strongly John feels the need to achieve, to accomplish, or to complete his work.

### Project and Goal Focus (7.6)

evaluates John's ability to stay on target regardless of circumstances.

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# Dimensional Balance

## External

### Empathy



### Practical Thinking



### Systems Judgement



## Internal

### Self Esteem



### Role Awareness



### Self Direction



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