

Management-Staff

Mike Kachline

Manager, Netsuite Operations Vertafore 02.24.2021



Hire great people, develop your leaders and grow your business! Support@RockstarWorkforce.com 602.321.7099

Table of Contents



introduction	3
Behavioral Characteristics	4
Value to the Organization	6
Checklist for Communicating	7
Checklist for Communicating - Continued	8
Communication Tips	9
ldeal Environment	10
Perceptions - See Yourself as Others See You	11
Descriptors	12
Natural & Adapted Style	13
Adapted Style	15
Keys to Motivating	16
Keys to Managing	17
Areas for Improvement	18
Action Plan	19
Behavioral Hierarchy	21
Style Insights® Graphs	24
The Success Insights® Wheel	25

Introduction



Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- How you respond to problems and challenges.
- How you influence others to your point of view.
- How you respond to the pace of the environment.
- How you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

> "All people exhibit all four behavioral factors in varying degrees of intensity."

Behavioral Characteristics



Based on Mike's responses, the report has selected general statements to provide a broad understanding of his work style. These statements identify the basic natural behavior that he brings to the job. That is, if left on his own, these statements identify HOW HE WOULD CHOOSE TO DO THE JOB. Use the general characteristics to gain a better understanding of Mike's natural behavior.

Mike prefers to help and support others rather than compete against them. He likes to start and finish activities. Others who work with him know they can depend on him. He tends to build a close relationship with a relatively small group of associates. He likes a consistent pace in his life, not too fast and not too slow. Mike can be friendly with others in many situations, but primarily with groups of established friends and associates. He is sociable and enjoys the uniqueness of each human being. He likes to develop a routine in both his personal and professional life and will function best when this routine is maintained. He is often seen as practical and objective. He requires many good reasons, as well as the benefits involved, before agreeing to making changes. Mike can be open, patient and tolerant of differences. His natural quality of being nonjudgmental is a great strength. Because he is receptive and listens well, he excels in gathering information. Others see him as a good neighbor, since he is always willing to help those he considers to be his friends.

Mike tries to use balanced judgment. He is the person who brings stability to the entire team. He may want to think over major decisions before acting. He must be convinced that actions will produce the desired result. Logic is important when trying to influence him. He pays more attention to logic than emotional "hype." Once he makes a decision, he can be organized in carrying it out. Mike may tend to fight for his beliefs or those things he feels passionate about. He tends to make decisions based on past experiences. He prefers the "tried and true." He is persistent and persevering in his approach to achieving goals. He adheres to company policy and doesn't break the rules just for the sake of breaking them.

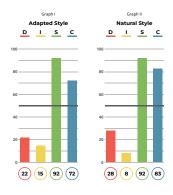


Behavioral Characteristics



Continued

Mike remains aloof from active participation in unfamiliar groups. He will talk more, however, in a group of people he trusts and has known for a long time. He tends to be possessive of information; that is, he doesn't voluntarily share information with others outside of his team. This may be a blessing, or a curse, to his superiors. He is more motivated by logic than emotion. To him, logic represents tangible research. Sometimes he will withdraw from a verbal battle. If he feels strongly about an issue, he may retreat to gather his resources and then return to take a stand! Rarely does he display his emotions; that is, he projects a good poker face. Others may get the feeling that he is unfriendly, when in reality he is not. He is not easily triggered or explosive, but he may conceal some grievances because he doesn't always state his feelings. Most people see him as being a considerate and modest person. He probably won't try to steal the spotlight from others. He likes to know what is expected of him in a working relationship and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues.



Value to the Organization



This section of the report identifies the specific talents and behavior Mike brings to the job. By looking at these statements, one can identify his role in the organization. The organization can then develop a system to capitalize on his particular value and make him an integral part of the team.

- ✓ Good listener.
- Builds good relationships.
- Dependable team player.
- Presents the facts without emotion.
- ✓ Always looking for logical solutions.
- ✓ Good at reconciling factions—is calming and adds stability.
- Objective and realistic.



Checklist for Communicating



Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with Mike. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Mike most frequently.

Ways to Communicate

- Use expert testimonials.
- Use an unemotional approach.
- Give him time to analyze the data before making a decision.
- Be patient and persistent.
- Provide guarantees that his decision will minimize risks; give assurance that provides him with benefits.
- Provide personal assurances, clear, specific solutions with maximum guarantees.
- Use the proper buzz words that are appropriate to his expertise.
- Listen to him.
- Provide a friendly environment.
- Have the facts in logical order.
- Show sincere interest in him as a person. Find areas of common involvement and be candid and open.
- Give pros and cons on ideas.
- Keep at least three feet away from him.



Checklist for Communicating

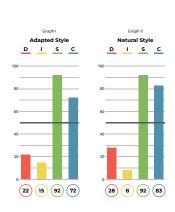


Continued

This section of the report is a list of things NOT to do while communicating with Mike. Review each statement with Mike and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.

Ways **NOT** to Communicate

- Sorce him to respond quickly to your objectives. Don't say, "Here's how I see it."
- Se disorganized.
- Se superficial.
- Pretend to be an expert if you are not.
- Nouch his body when talking to him.
- Offer assurance and guarantees you can't fulfill.
- Nush headlong into business or the agenda.
- O Debate about facts and figures.
- O Patronize or demean him by using subtlety or incentive.
- Make statements you cannot prove.
- Se abrupt and rapid.
- Manipulate or push him into agreeing because he probably won't fight back.



Communication Tips



This section provides suggestions for methods which will improve Mike's communications with others. The tips include a brief description of typical people with whom he may interact. By adapting to the communication style desired by other people, Mike will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior communicator.

© Compliance

When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- ✔ Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.
- Seing giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- Seing disorganized or messy.

Dominance

When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:

- ✓ Be clear, specific, brief and to the point.
- Stick to business.
- Be prepared with support material in a well-organized "package."
- Talking about things that are not relevant to the issue.
- \(\subseteq \) Leaving loopholes or cloudy issues.
- Appearing disorganized.

S Steadiness

When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment—break the ice.
- Present your case softly, non-threateningly.
- Ask "how?" questions to draw their opinions.
- Nushing headlong into business.
- Seing domineering or demanding.
- Forcing them to respond quickly to your objectives.

Influence

When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- ✓ Provide a warm and friendly environment.
- Don't deal with a lot of details (put them in writing).
- Ask "feeling" questions to draw their opinions or comments.
- Seing curt, cold or tight-lipped.
- O Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

Ideal Environment



This section identifies the ideal work environment based on Mike's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that Mike enjoys and also those that create frustration.

- Needs an opportunity to deal with people with whom a long-standing relationship has been established.
- Limited contact with people.
- A stable and predictable environment.
- An environment that allows time to change.
- Needs personal attention from his manager and compliments for each assignment well done.
- Environment where he can be a part of the team, but removed from office politics.
- Data to analyze.
- Little conflict between people.
- Private office or work area.



Perceptions



See Yourself As Others See You

A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on Mike's self-perception and how, under certain conditions, others may perceive his behavior. Understanding this section will empower Mike to project the image that will allow him to control the situation.



Mike usually sees himself as being:

Considerate

✓ Dependable

✓ Thoughtful

- ✓ Team Player
- ✓ Good-Natured
- ✓ Good Listener



Under moderate pressure, tension, stress or fatigue, others may see him as being:

- Nondemonstrative
- ✓ Unconcerned

✓ Hesitant

✓ Inflexible



Under extreme pressure, stress or fatigue, others may see him as being:

Possessive

Detached

✓ Stubborn

Insensitive

Descriptors



Based on Mike's responses, the report has marked those words that describe his personal behavior. They describe how he solves problems and meets challenges, influences people, responds to the pace of the environment and how he responds to rules and procedures set by others.

Driving	Inspiring	Relaxed	Cautious
	шэрші		
Ambitious	Magnetic	Passive	Careful
Pioneering	Enthusiastic	Patient	Exacting
Strong-Willed	Persuasive	Possessive	Systematic
Determined	Convincing	Predictable	Accurate
Competitive	Poised	Consistent	Open-Minded
Decisive	Optimistic	Steady	Balanced Judgment
Venturesome	Trusting	Stable	Diplomatic
Dominance	Influence	Steadiness	Compliance
			-
Dominance Calculating	Influence Reflective	Steadiness Mobile	Compliance Firm
			-
Calculating	Reflective	Mobile	Firm
Calculating Cooperative	Reflective Factual	Mobile Active	Firm Independent
Calculating Cooperative Hesitant	Reflective Factual Calculating	Mobile Active Restless	Firm Independent Self-Willed
Calculating Cooperative Hesitant Cautious	Reflective Factual Calculating Skeptical	Mobile Active Restless Impatient	Firm Independent Self-Willed Obstinate
Calculating Cooperative Hesitant Cautious Agreeable	Reflective Factual Calculating Skeptical Logical	Mobile Active Restless Impatient Pressure-Oriented	Firm Independent Self-Willed Obstinate Unsystematic

Natural & Adapted Style



Mike's natural style of dealing with problems, people, pace of events and procedures may not always fit what the environment needs. This section will provide valuable information related to stress and the pressure to adapt to the environment.



Problems & Challenges

Natural

Mike is cautious in his approach to problem solving and does not attempt to demand that his view, or opinion, be accepted at face value. Mike likes to solve problems within the framework of a team environment. He will look for a compromise as opposed to a win-lose situation.

Adapted

Mike sees no need to change his approach to solving problems or dealing with challenges in his present environment.

On on

People & Contacts

Natural

Mike feels that the convincing of people can only be done within the framework of logical facts presented by totally objective people or machines. He rarely displays emotion when attempting to influence others.

Adapted

Mike sees no need to change his approach to influencing others to his way of thinking. He sees his natural style to be what the environment is calling for.

Natural & Adapted Style





Pace & Consistency

Natural

Mike is comfortable in an environment in which there are few projects going on concurrently. He is appreciative of the team concept and feels quite secure in an environment where the need to move from one activity to another quite quickly is held to a minimum.

Adapted

Mike sees his natural activity style to be just what the environment needs. What you see is what you get for activity level and consistency. Sometimes he would like the world to slow down.



Procedures & Constraints

Natural

Mike naturally is cautious and concerned for quality. He likes to be on a team that takes responsibility for the final product. He enjoys knowing the rules and can become upset when others fail to comply with the rules.

Adapted

Mike shows little discomfort when comparing his basic (natural) style to his response to the environment (adapted) style. The difference is not significant, and Mike sees little or no need to change his response to the environment.

Adapted Style



Mike sees his present work environment requiring him to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why he is adapting this behavior.

- Being precise in the collection of data.
- Accomplishing tasks without many people contacts.
- Making decisions in an objective, unemotional manner.
- Being attentive and dependable with detailed work activities.
- Limited or prepared changes in routine.
- Using a disciplined approach.
- Freedom from confrontation.
- Adherence to established guidelines and procedures.
- Logical solutions.
- Exhibiting patience and good listening skills.
- Projecting a limited display of emotion.
- Gathering data in a logical, systematic way.



Keys to Motivating



This section of the report was produced by analyzing Mike's wants. People are motivated by the things they want; thus wants that are satisfied no longer motivate. Review each statement produced in this section with Mike and highlight those that are present "wants."

Mike wants:

- ✓ Traditional products and procedures.
- Straight talk supported with facts.
- Limited socializing.
- ✓ Specific questions—not general or open-ended.
- ✓ Tangible evidence of effort.
- ✓ Facts and data for making decisions.
- Activities he can start and finish.
- Identification with fellow workers.
- ✓ To be a member of a small team.
- Constant appreciation and a feeling of security on the team.
- ✓ No sudden changes in procedure.
- Objectivity.
- An environment where he can ask specific questions—not just "beat around the bush."



Keys to Managing



In this section are some needs which must be met in order for Mike to perform at an optimum level. Some needs can be met by himself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with Mike and identify 3 or 4 statements that are most important to him. This allows Mike to participate in forming his own personal management plan.

Mike needs:

- ✓ The facts in a logical sequence.
- ✓ Logical answers in logical order.
- ✓ Time to gather the facts and data.
- ✓ The opportunity to ask questions to clarify or determine why.
- Reassurances that he is doing the job right.
- ✓ An objective boss who values his quiet demeanor.
- ✓ Shortcut methods that don't affect quality of the work.
- Skills to come across warm and close, when appropriate.
- Time to warm up to people.
- ✓ A quality product in which to believe.
- ✓ A warm and friendly work environment.
- ✓ Support in making high-risk decisions.



Areas for Improvement



In this area is a listing of possible limitations without regard to a specific job. Review with Mike and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.

Mike has a tendency to:

- Dislike change if he feels the change is unwarranted.
- Hold a grudge if his personal beliefs are attacked.
- Not let others know where he stands on an issue.
- Become resistive and indecisive when forced to act quickly. Without proper information, he will resist in a passive-aggressive manner.
- Avoid accountability by overstating the complexity of the situation.
- Not take action against those who challenge or break the rules or guidelines.
- Not project a sense of urgency—others may not feel the pressure to help immediately.
- Take criticism of his work as a personal affront.



Action Plan



Professional Development

1.	I learned the following behaviors contribute positively to increasing my professional effectiveness: (list 1-3)
2.	My report uncovered the following behaviors I need to modify or adjust to make me more effective in my career: (list 1-3)
3.	When I make changes to these behaviors, they will have the following impact on my career:
4.	I will make the following changes to my behavior, and I will implement them by:

Action Plan



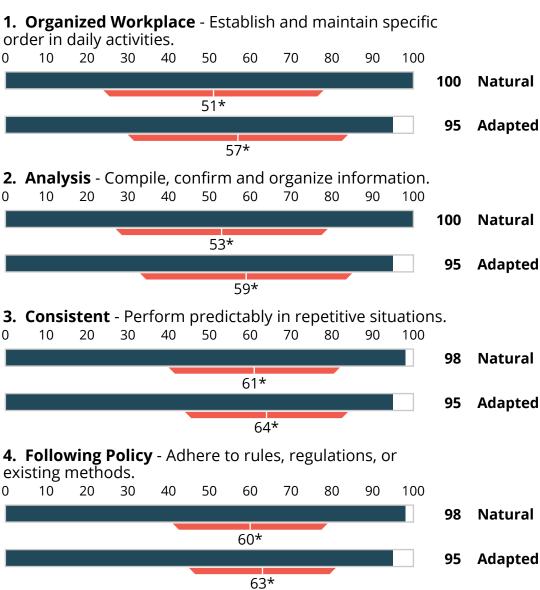
Personal Development

1.	When reviewing my report for personal development, I learned the following key behaviors contribute to reaching my goals and the quality of life I desire: (list 1-3)
2.	The following behaviors were revealed, which show room for improvement to enhance the quality of my life: (list 1-3)
3.	When I make changes to these behaviors, I will experience the following benefits in my quality of life:
4.	I will make the following changes to my behavior, and I will implement them by:

Behavioral Hierarchy



The Behavioral Hierarchy graph will display a ranking of your natural behavioral style within a total of twelve (12) areas commonly encountered in the workplace. It will help you understand in which of these areas you will naturally be most effective.

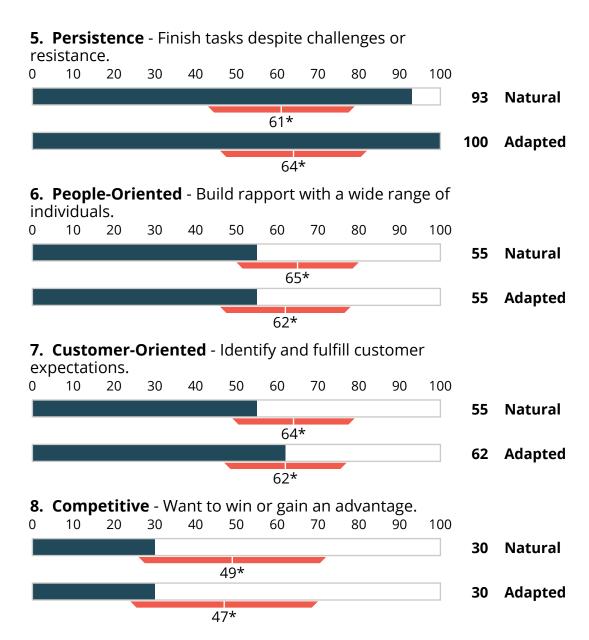


^{* 68%} of the population falls within the shaded area.

Behavioral Hierarchy



Continued

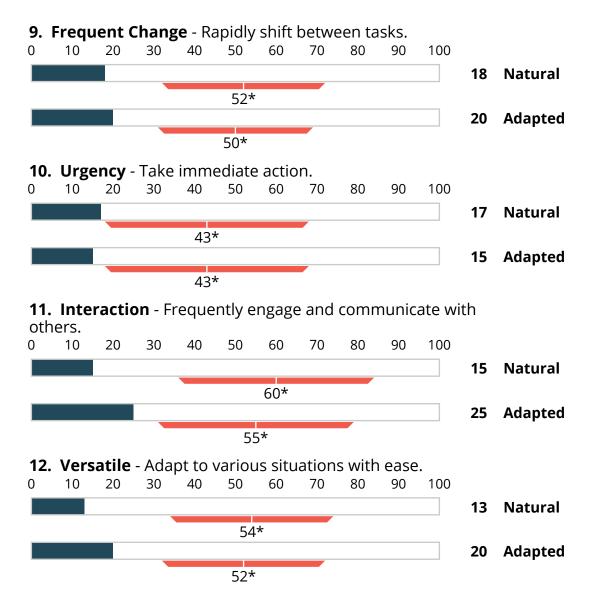


^{* 68%} of the population falls within the shaded area.

Behavioral Hierarchy



Continued



SIA: 22-15-92-72 (19) SIN: 28-08-92-83 (20)

^{* 68%} of the population falls within the shaded area.

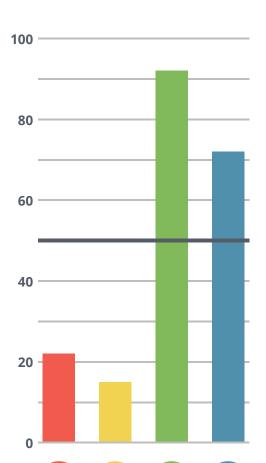
Style Insights® Graphs



Graph I

Adapted Style

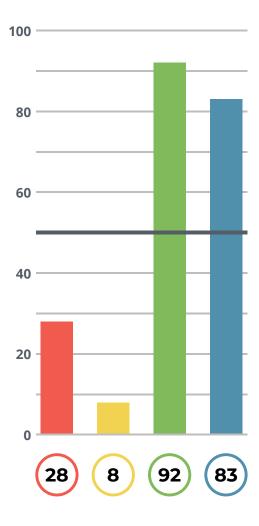
D I S C



Graph II

Natural Style

D I S C



Norm 2017 R4

2-24-2021 T: 10:36

92

The Success Insights® Wheel



The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.

Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

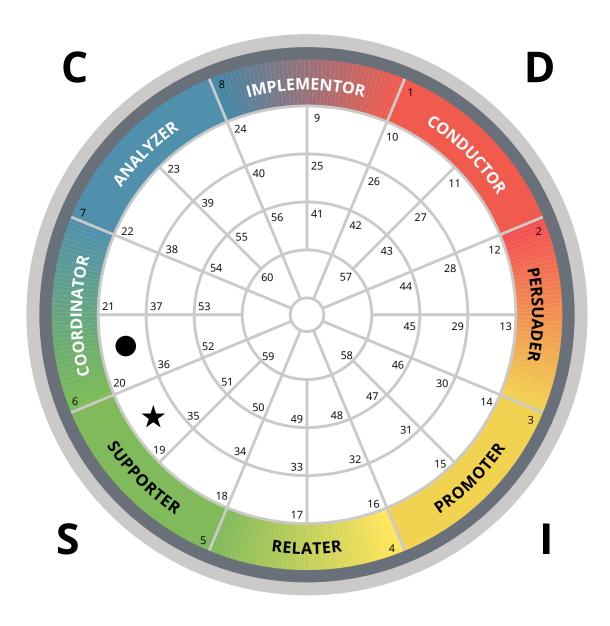
If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.

The Success Insights® Wheel



Mike Kachline

Vertafore 2-24-2021



Adapted: **★** (19) COORDINATING SUPPORTER Natural: (20) SUPPORTING COORDINATOR

Norm 2017 R4