

For Neil McEvoy

Identification #: 3425694

Administrator: FC056 NovaScotiaWest
Version: Canada Financial Services

Sun Life Financial Distributors (Canada) Inc.
Date: 4/12/2008

Executive Summary

Career Profile+ Rating: Proceed

Based on this candidate's past performance, available natural market, and employment and financial stability, compared with other candidates with similar work experience this candidate is likely to:

- Exceed most candidates in first-year production and put forth above-average effort toward meeting organizational objectives
- Continually set difficult yet attainable goals personally and for those around him or her
- Display above-average productivity and high desire to succeed
- Have an average chance of staying with the company during the first contract year

Selection Considerations

Generally, candidates with high levels of persuasiveness, energy, achievement drive, and initiative will enjoy and can be effective in sales positions if other critical competencies are present. It may be important to explore how the candidate has successfully used these characteristics to succeed in sales in the past using the interview questions beginning on page 13.

- This candidate states that he or she is mostly confident meeting the personal, technical, and sales aspects of the position. However, it is unlikely a candidate will have no concerns regarding a new sales position, and it is highly recommended to use the interview questions provided to get a better understanding of the candidate's concerns.

Career Presentation Guide

- This candidate is equally motivated at a moderate level by non-work related activities, self-directed activities such as improved skill acquisition, and motivators typically associated with successful sales careers such as money, recognition, and independence.
- It may be challenging to use the motivators typically associated with financial services organizations with this candidate. Motivators that he or she may find rewarding should be probed for and discussed during the interview process using the interview questions later in the report. Create your own interview questions based on motivators that the candidate indicated were "Not Important" or "Somewhat Important" to him or her.
- It may be challenging to reward this candidate based on his or her lack of motivation for a wide spectrum of rewards including those usually associated with sales positions.

For Neil McEvoy

Management Considerations

This candidate's personality and work styles provide insight for coaching. As a follow-up step, take this into consideration:

- Provide venues that allow the candidate to exercise his or her natural persuasive skills.
- Limit the use of unnecessary restrictions on the way they use their time.
- Adopt a hands-off approach to goal setting, as this candidate will likely set challenging personal goals.
- Empower the candidate to set personal objectives, as he or she may resent unnecessary restrictions.

Based on issues such as past sales history, knowledge about financial planning careers, and familiarity with the position, it is very likely that this candidate will accept the position if it is offered to him or her.

Personality Summary (See pages 6 to 9 for details)

Personality Characteristics	Low	Moderate	High
Persuasiveness			
Energy			
Achievement Drive			
Initiative and Persistence			

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Career Profile+ Rating: Proceed

Your company has instructed LIMRA to report this rating as Proceed. To find out more about what this rating means, call your home office or head office.

Survival and Productivity

The Career Profile+ rating is a combination of two predictors: first-year survival and first-year-production. The chart below shows how this candidate rated in these two areas:

	Below-Average Production	Average Production	Above-Average Production
Below-Average Survival			
Average Survival			
Above-Average Survival			

In other words, compared with an average candidate:

- This candidate has an average chance of surviving his or her first contract year.
- This candidate has an above-average chance of being among the top producers in your company.

It is very likely that this candidate will accept a position if you offer it.

Interpretation Notes:

- There are some inconsistencies in the way this candidate answered some of the Career Profile+ questions, suggesting that perhaps he or she did not carefully consider his or her answers. For example, questions about employment status, student status, and/or educational level may have been answered inconsistently.

For Neil McEvoy

The information on Motivators, Concerns, Expectations, Work Styles, and Personality Characteristics is not directly related to the Career Profile+ rating. This information is offered for the purpose of conducting follow-up interviews and should help in the understanding of key candidate characteristics and in achieving optimum candidate-organization fit.

Motivators

Motivators do NOT impact the overall Career Profile+ rating.

The chart below shows how the candidate rated each of the following motivators. Later in this report, you will find interview questions suggested for motivators that the candidate rated as Very Important or Extremely Important.

	Not Important	Somewhat Important	Important	Very Important	Extremely Important
Independence					
Power					
Recognition					
Prestige					
Money					
Security					
Professional growth					
Service					
Leisure time					
Family time					
Reward travel					

The candidate's responses indicate:

- This candidate is equally motivated at a moderate level by non-work related activities, self-directed activities such as improved skill acquisition, and motivators typically associated with successful sales careers such as money, recognition, and independence.

In presenting the career to this candidate, keep in mind the following:

- It may be challenging to use the motivators typically associated with financial services organizations with this candidate. Motivators that he or she may find rewarding should be probed for and discussed during the interview process using the interview questions later in the report. Create your own interview questions based on motivators that the candidate indicated were "Not Important" or "Somewhat Important" to him or her.

For Neil McEvoy

Concerns

Concerns do NOT impact the overall Career Profile+ rating.

The chart below shows how the candidate rated each of the following concerns about the position. Later in this report, you will find interview questions suggested for concerns that the candidate rated as "not sure" or "hard to handle."

	It will be hard for me to handle this	I am not sure whether I can handle this	I can probably handle this	I am sure that I can handle this
Finding enough prospective clients				
Using my own money for business expenses				
Meeting expectations of management				
Being accepted as a trusted advisor by clients				
Being able to use a personal computer				
Being able to accept rejection from potential clients				
Working long hours				
Keeping current with industry knowledge				
Mixing business with pleasure at social events				
Approaching people I know for business purposes				
Selling enough to make the income I need				
Answering in-depth questions about products				
Performing well enough to meet my own standards				
Having enough time for friends and family				

The candidate's responses indicate:

- This candidate states that he or she is mostly confident meeting the personal, technical, and sales aspects of the position. However, it is unlikely a candidate will have no concerns regarding a new sales position, and it is highly recommended to use the interview questions provided to get a better understanding of the candidate's concerns.

In presenting the career to this candidate, keep in mind the following:

- As suggested above, to get a more realistic assessment of the candidate's concerns regarding the position, it will be necessary to address this area using the interview questions later in this report.

For Neil McEvoy Expectations

Expectations do NOT impact the overall Career Profile+ rating.

The chart below shows how the candidate responded to questions about his or her expectations of this position. It also shows what is characteristic of your office according to your office profile, if available. If an office profile is available, you will find a list of expectations that differ noticeably between this candidate's responses and your office later in this report.

	Candidate's Response	Office Profile
Number of evenings typically worked per week	4 evenings per week	3 evenings per week
Number of hours per week spent learning sales presentations and product information during first few weeks after licensing	11 to 15 hours per week	1 to 5 hours per week
Number of hours per week spent on the telephone for business purposes	21 to 25 hours per week	1 to 5 hours per week
Total number of hours worked per week	20 to 29 hours per week	45 to 49 hours per week
Money spent per week on out-of-pocket business expenses	\$200 to \$299 per week	\$25 to \$49 per week
Number of contacts needed to get one sales interview	30 or more people	3 or 4 people
Number of sales presentations needed to get one sale	10 to 14 presentations	3 or 4 presentations
Number of sales for a typical first-year producer in this office	20 to 39 sales	60 to 99 sales
Average income for a typical first-year producer in this office	\$50,000 to \$99,999	\$40,000 to \$49,999
Amount candidate expects to earn in his or her first year in this office	\$100,000 to \$149,999	N/A
Average income for a typical third-year producer in this office	\$100,000 to \$149,999	\$70,000 to \$79,999
Amount candidate expects to earn in his or her third year in this office	\$125,000 to \$149,999	N/A

Although the Office Profile is not directly related to the Career Profile+ rating, the candidate's expectations that are different from your Office Profile are shown above in bold type. It is important that this candidate understand that, in your office, the following expectations are typical:

- A first-year representative in this office typically works 3 evenings per week.
- During the first few weeks after licensing, a typical representative in this office spends 1 to 5 hours per week in the office or at home studying sales presentations or learning about products.
- A typical first-year representative in this office spends 1 to 5 hours per week on the telephone for business purposes.
- A typical first-year representative in this office spends 45 to 49 hours per week working, studying, and training.
- On average, a typical first-year representative in this office spends \$25 to \$49 per week on out-of-pocket business expenses.
- A typical first-year representative in this office has to contact 3 or 4 people by telephone, letter, or in person to arrange one face-to-face sales interview.
- A typical first-year representative in this office has to make 3 or 4 presentations to get one sale.
- A typical representative in this office makes 60 to 99 sales during his or her first year.
- After subtracting business expenses, a typical representative in this office makes \$40,000 to \$49,999 during his or her first year.
- After subtracting business expenses, a typical representative in this office makes \$70,000 to \$79,999 during his or her third year.




The candidate may leave the organization after a short period of time if he or she is contracted with an unrealistic picture of the work he or she will be expected to do.











For Neil McEvoy

Work Styles

Work Styles do NOT impact the overall Career Profile+ rating.

The chart below shows how the candidate responded to questions about his or her work preferences. It also shows work styles that are characteristic of your office according to your office profile, if available. If an office profile is available, you will find a list of work styles that differ noticeably between this candidate's responses and your office later in this report.

- Key:**
-  Represents the candidate's response.
 -  Represents the office profile.
 -  Represents agreement between the candidate and the office profile.

	Not Important or Characteristic	Somewhat Important or Characteristic	Important or Characteristic	Very Important or Characteristic	Extremely Important or Characteristic
Working in a team environment is...					
Working with a mentor is...					
Independence in setting own goals is...					
Working with minimal supervision is...					
Learning in formal training sessions is...					
Learning by observing others is...					

It is important for this candidate to understand that significant differences in your organization's and his or her preferred work styles may result in less than optimal performance if not addressed.

- Working with a mentor is very characteristic of your organization, while working with a mentor is not important to this candidate.
- Independence in setting own goals is extremely characteristic of your organization, while independence in setting own goals is somewhat important to this candidate.
- Learning in formal training sessions is extremely characteristic of your organization, while learning in formal training sessions is important to this candidate.
- Learning by observing others is extremely characteristic of your organization, while learning by observing others is important to this candidate.

For Neil McEvoy

Personality Characteristics

Personality Characteristics do NOT impact the overall Career Profile+ rating.

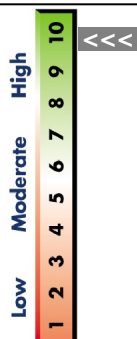
The following personality characteristics are related to success in a financial services sales/planning career. In general, the higher the score for each personality characteristic, the more likely the candidate will succeed in the career. For each personality characteristic, this report shows the candidate's score, a definition of the characteristic, general qualities frequently observed in people with this score, likely sales behaviors, and coaching tips that include developmental opportunities. Later in this report, you will find suggested interview questions for each personality characteristic.

Persuasiveness

Persuasiveness addresses being effective at changing the opinions or perspectives of others, including persuading others with convincing arguments, effectively selling ideas, convincing and influencing others, and liking to sell and negotiate.

This candidate's score for Persuasiveness is 10

Candidates who score High in Persuasiveness



General Qualities

- Influence people without pressuring them
- Enjoy trying to talk people into things
- Enjoy arguments where they try to persuade others
- Have a natural talent for influencing people

Sales Behaviors

- Are good at selling
- Are comfortable doing business in social situations
- Work best when given freedom to choose their own approach
- Will not back down when their point of view is challenged
- Accept constructive criticism from their manager
- Use personal charm or charisma to get what they want

Summary:

- This candidate will most likely be able to effectively tailor presentations to meet the needs of whatever audience he or she is presenting to.
- This candidate will likely make use of effective planning, diagnosing, presenting, and closing and enjoys persuading others to align with his or her perspectives.
- This candidate generally enjoys the challenges presented by skeptical audiences and is often successful at converting even the most difficult prospects.

Coaching Tips:

Candidates high in persuasiveness generally enjoy persuading others to their point of view, but may run the risk of pressuring people to buy or stretch the truth to get a sale.

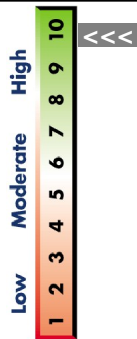
- Provide venues that allow the candidate to exercise his or her natural persuasive skills.
- Allow the candidate the independence to use the presentation skills he or she brings to the table, as long as he or she remains in compliance.

For Neil McEvoy

Energy

Energy addresses working quickly and energetically, working effectively in a fast-paced environment, and sustaining a high level of energy over time.

This candidate's score for Energy is 10



Candidates who score High in Energy

General Qualities

- Work quickly and energetically
- Tend to do things rapidly, even when there is plenty of time
- Enjoy working in a fast-paced environment
- Feel restless when they are not keeping busy
- Enjoy work where they have to handle many competing demands at once

Sales Behaviors

- Manage time efficiently
- Make decisions quickly
- Make good use of office staff by delegating appropriately
- Learn complex new material quickly
- Increase effort levels for sales contests

Summary:

- This candidate is likely to use all of his or her available resources effectively and is best suited to an environment that continually offers challenging and fast-paced workloads.
- This candidate is likely to integrate information from many sources, will respond positively to an environment full of similar people, and may become frustrated if forced to work with others who do not share his or her fast-paced orientation.
- This candidate is likely to actively prospect and displays enthusiastic energy when proposing products and closing presentations.

Coaching Tips:

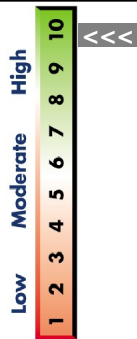
Generally speaking, candidates with high energy can succeed in sales and perform best when they are guided to use their natural liveliness as suggested by the following coaching tips:

- Limit the use of unnecessary restrictions on the way they use their time.
- Assign a wide variety of tasks/cases with increasingly challenging deadlines.

For Neil McEvoy Achievement Drive

Achievement Drive addresses setting challenging personal goals, striving to exceed existing standards of performance, and striving to improve performance.

This candidate's score for Achievement Drive is 10



Candidates who score High in Achievement Drive

General Qualities

- Like to measure their performance against challenging goals
- Strive to exceed existing standards of performance
- Are often thinking about how to improve their own or the group's performance
- Often try to find better, faster or more efficient ways of doing things

Sales Behaviors

- Set higher goals for themselves than their manager does
- Continue to push on after formal goals are met
- Enjoy prospecting and do it enthusiastically
- Adapt quickly to changing schedules or priorities

Summary:

- This candidate is very likely to set challenging personal goals and follow through using all available resources to make sure goals are met.
- This candidate may prefer to work independently, although he or she will probably not hesitate to solicit assistance from others if it will help in reaching goals.
- This candidate is likely to respond favorably to challenges that present a clear "winner" and may be frustrated in environments that don't offer competition and demanding targets.
- This candidate will probably be driven to identify and make convincing sales presentations to qualified prospects and will usually conduct the necessary steps to ensure success, such as developing a proposal based on thorough needs analyses.

Coaching Tips:

Generally speaking, candidates who score high on achievement drive can succeed in sales if other critical competencies are present. They perform best when provided with the freedom to pursue their goals. The following items should be considered if you continue with the candidate:

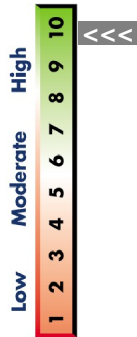
- Adopt a hands-off approach to goal setting, as this candidate will likely set challenging personal goals.
- Make sure the candidate has the necessary resources to succeed at a high level.

For Neil McEvoy

Initiative and Persistence

Initiative and Persistence address being willing to take on responsibilities and challenges, persisting at overcoming obstacles, and being willing to put in extra effort to complete things.

This candidate's score for Initiative and Persistence is 10



Candidates who score High in Initiative and Persistence

General Qualities

- Have a strong commitment to getting things completed
- Seek out opportunities to take on new responsibilities
- Are willing to work longer and harder on a project than most people
- Will work extra hours to complete things
- Push themselves to the limits of their ability

Sales Behaviors

- Bounce back easily from rejection
- Persist in attempting to close when faced with objections
- Are quick to pick up the phone to ask for an appointment
- Work independently -- do not require a lot of their manager's time
- Provide responsive customer service

Summary:

- This candidate will often act proactively to achieve whatever goals are set for him or her, regardless of the obstacles that act as a barrier to progress.
- This candidate may view setbacks as temporary instances and is not likely to be derailed by objections.
- This candidate will likely strive to exhibit excellent customer service and production by taking the initiative to set personally challenging goals and working to meet them.

Coaching Tips:

Generally speaking, candidates with high initiative and persistence can succeed in sales positions. The following should be taken into consideration if you proceed with this candidate:

- Empower the candidate to set personal objectives, as he or she may resent unnecessary restrictions.
- Allow the candidate to be somewhat flexible regarding selling style, even if it is different from conventional approaches. Do not over script.

For Neil McEvoy Interview Questions

This section of the report provides suggested interview questions to ask the candidate. If an office profile is available for your office, the report also highlights areas where the candidate's expectations about the position and work style preferences differ noticeably from what is characteristic of your office.

Motivators

This candidate indicates that the following motivators are very important or extremely important to him or her:

- Prestige
- Money
- Professional growth
- Service

Consider asking the candidate to talk about which motivators are important to him or her. Then ask the candidate the following questions for as many of the important motivators as you feel are appropriate. We recommend that you take notes as the candidate responds to your questions.

You have indicated these motivators are very or extremely important to you.

1. What does (this) mean to you?

2. Why is this important to you?

3. How would you hope to achieve this if you obtained this position?

For Neil McEvoy

Concerns

Consider asking the candidate to talk about any concerns he or she may have about the position. Then ask the candidate the following questions for as many of the concerns as you feel are appropriate. We recommend that you take notes as the candidate responds to your questions.

1. Why does this concern you?

2. Tell me about another time when you have had a problem with this.

3. Tell me why you think you will have a hard time with this now, if you obtain this position.

4. Tell me how you might change this from a problem to an asset.

For Neil McEvoy

Expectations

The candidate's expectations of the position differ from your office profile in the following areas:

- Number of evenings typically worked per week
- Number of hours per week spent learning sales presentations and product information during first few weeks after licensing
- Number of hours per week spent on the telephone for business purposes
- Total number of hours worked per week
- Money spent per week on out-of-pocket business expenses
- Number of contacts needed to get one sales interview
- Number of sales presentations needed to get one sale
- Number of sales for a typical first-year producer in this office
- Average income for a typical first-year producer in this office
- Average income for a typical third-year producer in this office



It appears that this candidate has an unrealistic understanding of what the position involves. Consider clarifying these issues with the candidate later in the selection process.

Work Styles

This candidate's work styles and the characteristics of your office differ in the following areas:

- Working with a mentor is very characteristic of your organization, while working with a mentor is not important to this candidate.
- Independence in setting own goals is extremely characteristic of your organization, while independence in setting own goals is somewhat important to this candidate.
- Learning in formal training sessions is extremely characteristic of your organization, while learning in formal training sessions is important to this candidate.
- Learning by observing others is extremely characteristic of your organization, while learning by observing others is important to this candidate.



Consider discussing these differences with the candidate, if you continue the selection process with him or her.

For Neil McEvoy

Personality Characteristics

Consider asking the candidate the following questions about the personality characteristics listed below. Ask as many questions as you feel are appropriate.

Persuasiveness

It can be frustrating to give someone advice that you believe is right on target and then have the person ignore your advice. Think about the last time this happened to you. When you gave someone advice and he or she ignored it, how did you react?

Sometimes it is necessary to change the way you approach a person in order to get him or her to do as you desire. Tell me about a time when this happened to you. How did you change your approach to get the person to do what you wanted him or her to do?

Energy

Tell me about a time when you had to learn some important material in less time than you would have liked. What was the outcome? Were you able to successfully learn the material?

Some work or school environments are slow-paced and leisurely. Others are fast-paced and hectic. What is the fastest-paced environment that you have ever been in? How did you feel about being in such a fast-paced environment?

For Neil McEvoy

Achievement Drive

Describe a situation in which competition caused you to try to improve your performance. What was the outcome? How did you feel about competing with others?

We are not always realistic when it comes to setting personal goals. When was the last time that you set an overly ambitious goal for yourself that you did not achieve? When you could not achieve it, how did you react?

Initiative and Persistence

Sometimes it is easier to "sit tight" and do nothing instead of tackling a difficult problem or situation. Can you tell me about a difficult situation in which you took action, even though the best response was unclear? Would you do anything differently the next time?

Tell me about a situation when you recognized that a problem existed, but it was not technically "your job" or "your business". Did you propose a solution to the problem anyway? What was the outcome?

For Neil McEvoy

Worksheet

Use this worksheet to organize the information in this report and the information you have gathered from the interview questions to help formulate a decision for this step in your selection process.

This candidate's Career Profile+ rating is...	Rating
	Proceed

Does this candidate's Career Profile+ rating fall within your acceptable range?			Yes	No
Motivators: To what extent is this candidate likely to be motivated by what this position has to offer?	Not at all	A little	Some	A lot

List any concerns you may have:

Concerns: To what extent are this candidate's concerns likely to interfere with his or her successful performance?	Not at all	A little	Some	A lot

List any concerns you may have:

Expectations: To what extent does this candidate have a realistic view of the position?	Not at all	A little	Some	A lot

List any concerns you may have:

Work Styles: To what extent are this candidate's work styles compatible with those of your office?	Not at all	A little	Some	A lot

List any concerns you may have:

Personality Characteristics: To what extent are this candidate's personality characteristics compatible with success in the career?	Not at all	A little	Some	A lot

List any concerns you may have:

Continue the selection process with this candidate?	Yes	No

Name

Date