



User's Manual

The Sales Personnel Report 2.0

**Partnering With You To Drive Organizational
Effectiveness**

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INTRODUCTION

The Sales Personnel Report 2.0 revision is modeled on the professional experience and research publications of the nationally known psychologist Dr. Michael Karson, a recognized authority on objective personality testing.

As a well-constructed, scientifically validated personality inventory, interpreted according to the way traits are expressed in the workplace, The Sales Personnel Report 2.0 constitutes a vital addition to other sources of data used in making personnel selection decisions.

The information contained in The Sales Personnel Report 2.0 is based on an applicant's performance on a 185-item personality inventory called the 16PF Questionnaire. This is a multiple-choice questionnaire that takes 30-45 minutes to complete and requires about a 5th grade reading level.

The 16PF, available in many languages, is one of the most widely used personality tests in industry throughout the world. It is supported by extensive research, publications, and scientific journals.

The 16PF generates a score, from 1 to 10, on sixteen major personality factors, and 5 performance factors, as well as scores on 3 validity scales. The validity scales are critical in determining how candidly the person answered the questionnaire and whether the person responded as most people do.

There are some personality characteristics that may raise concerns about how well the applicant can perform almost any job. For example, people who are easily frustrated or extremely impractical are likely to have trouble adapting to most kinds of work. Other personality characteristics are relevant only to particular jobs. For instance friendliness or being highly social is usually an asset for sales.

The Sales Personnel Report 2.0 covers both types of personality job interactions. On the general side, it can indicate areas of potential concern to be assessed by further evaluation. On the specific side, the traits discussed in the performance factor section and the narrative description of the subject's personality assist decision-makers, in coordination with other sources of data, in finding the person whose characteristics most closely align with the job.



HOW TO INTERPRET THE SALES PERSONNEL REPORT 2.0

The Rewards of a Solid Hiring Procedure

Although hiring a salesperson can be a lot of work, the reward, in terms of revenue to your company, is huge. **Hiring right is worth the time you invest.**

The absolute fact is this... if you hire salespeople without in-depth interviewing, analyzing and assessing their "fit" to the job, the work environment, the team or the customer, you are hiring a risk that will cost your company for years to come.

There is no greater loss than letting go a salesperson who was the wrong fit... it hurts your company, the sales team and most importantly the customer. The loss of their knowledge, loss of future sales and the potential loss of client relationships can be monumental.

Your hiring practice should be based on a **BALANCED SCORECARD** approach when using assessments. Results should confirm and validate key considerations. Assessment data should be integrated with all other information to determine job fit.

- ◆ Background/work history
- ◆ Education and training
- ◆ Resume and interview
- ◆ Skills and abilities
- ◆ Competency evaluation
- ◆ Reference Check

TIPS

There is **NO SINGLE SCORE** on The Sales Personnel Report 2.0 that tells you to hire or not to hire. The report is going to provide ranges to consider and guidelines to help you analyze performance potential of your candidates. Anything outside those ranges should be considered "higher risk" because the behavior begins to move further away from the desired behavior that is essential in a given role.

As an example, a shy (H-) salesperson will have trouble prospecting and an accommodating (E-) salesperson will have trouble closing. The important thing to remember is to try to let the report help you understand how a person behaves, thinks and feels. That will help you understand what they are likely to do on the job. This is a behavior-based process not a skills-based process. How the person's behavior manifests itself in a work setting is what we are after.



HOW TO INTERPRET THE SALES PERSONNEL REPORT 2.0 cont.

The Sales Personnel Report 2.0 is nothing more than a guide for you. Do not try to over complicate the report. Let the report confirm your thoughts about the candidate and let the report guide you away from potential problem areas. You will never hire a perfect person. Everyone you hire will have “gifts” and “limitations”. You are trying to confirm that their assets outweigh their liabilities.

For example, a salesperson that scores less than 5.0 on social boldness (H -) may not possess enough outgoingness to succeed in a position where a lot of prospecting is required. As you evaluate the position you are trying to fill, you need to evaluate what sort of behaviors you want this person to have. It may be beneficial to even review or update the job description.



WHAT THE SALES PERSONNEL REPORT 2.0 DOES

In reading through the report, familiarize yourself with the different sections. You will be able to gain greater insight into an applicant's characteristics by paying attention to the key areas that affect sales performance.

You can use this information to help make better judgments, to select the most qualified candidate. As you consider the position you are trying to fill, evaluate what sort of behaviors you want the person to have. By staying within a range of scores, versus trying to match exact scores, you can understand any potential limitations a person may have.

Important points to remember:

- The SPR2.0 contains **highly confidential** information.
- Results should **NEVER** be shared with the candidate.
- **NEVER** tell the candidate that their test results prohibited them from obtaining the job.
- The SPR2.0 should **NOT** be the sole basis for denying employment or promotion.

The report must be read and applied carefully. Keep in mind it is only **one** source of information and should be viewed as hypothesis to be validated against other sources of data such as interviews, work history, background checks, biographical data, and other assessment results.

If you have questions about the results, please call us to set up a consultation to discuss the contents in more detail.



SALES PERSONNEL REPORT FORMAT

The SPR 2.0 consists of six different sections:

1. Employee Information
2. Primary Personality Factors (Profile Summary Graph Sales)
3. Performance Factors (Sales)
4. Areas of Potential Concern
5. Work-Related Personality
6. Profile Validity

1. EMPLOYEE INFORMATION

The Employee Information Section identifies the organization, the applicant's name and the date the assessment was processed.

Due to the candid nature of the information presented, The Sales Personnel Report 2.0 is **NOT** designed for applicant feedback and should **NEVER** be given to an applicant or employee. The appropriate hiring manager should use the report exclusively as a management tool. The Information is confidential and should be shared only with others who have a need to know the information.

2. PRIMARY PERSONALITY FACTORS (SALES)

The Primary Personality Factors or Profile Summary Graph, presents at a glance, the applicant's scores on the primary personality factors interpreted by The Sales Personnel Report 2.0. The 16 factors are relatively independent; but in practice, certain factors do tend to cluster together. For example, people who are socially bold (H+) also tend to be more warm & friendly (A+) and to have plenty of energy (F+).

Compare the candidate's scores on each factor with the suggested ranges indicated by the shaded areas. Individual scores provided here are **SUGGESTED** ranges for each position. They are merely a guideline to follow. First identify any scores outside a given range. Next, identify if the trait is essential and necessary to perform the role.



2. PRIMARY PERSONALITY FACTORS (SALES) cont.

Modest experience with The Sales Personnel Report 2.0 will result in quick proficiency in the use of the factors mentioned on the Profile Summary Graph and how they relate to Performance Factors, Areas of Potential Concern, and the narrative report. For example, a candidate with low frustration tolerance (C-) should be considered cautiously. This individual is often overwhelmed by the challenges and responsibilities of the job. He or she often has an inability to “roll with the punches” and can become non-functional when stressed in the work setting. Interviews with past supervisors would be wise with such concern.

While noting which factors are identified as Areas of Potential Concern or in questionable ranges and which are outside of the shaded area, questions may be framed for the follow-up interview process to provide even better insight into an applicant’s behavior and how it will likely impact his or her work performance.



3. PERFORMANCE FACTORS (SALES)

The Performance Factors are often relevant to long-term success and commitment within an organization. They should be carefully evaluated to determine a candidate's overall performance potential, along with any Areas of Potential Concern that may have been identified.

The Performance Factors are made up of 5 characteristics as they relate to job performance. Factor B, a primary factor, should be considered also.

Integrated into the Performance Factors are areas for development specifically related to the sales process. Some of these will be discussed under Areas of Potential Concern. Others are offered as areas in which an enhanced focus on development may prove beneficial.

These areas will help you determine the learning curve your applicant may have and what kind of investment you will need to make to get them up to speed. You can use this guide to help you evaluate their ability to handle the demands of the job or territory and areas to target for coaching and development once they are hired.

A. Reasoning and Problem Solving / Factor B

When evaluating performance potential, it is important to look at Factor B. This can be used as a quick measure of mental ability. The factor reflects the salesperson's approach to solving problems. It measures a person's ability to quickly grasp verbal concepts and ideas, work through data and assimilate new information. High scorers tend to be seen as bright, quick learners who are adept at abstract thinking and problem solving.

More Concrete				More Abstract						
potential concern			?	desirable						
1	2	3	4	5	6	7	8	9	10	

- Scores of 4.5 or greater indicate a higher level of reasoning and problem solving abilities.
- Scores between 3.5 and 4.5 indicate question about the level of reasoning and problem solving abilities related to the demands of the job.
- Scores less than 3.5 should raise concern as to whether the person has enough reasoning skills for the position.



3. PERFORMANCE FACTORS cont.

A. Reasoning and Problem Solving / Factor B cont.

Low scorers tend to be more hands on learners with a more concrete learning style. In roles that are more challenging, complex or even highly technical in nature, people with low score may have trouble conceptualizing and even getting up to speed in areas where they may be unfamiliar. They may need more time to reflect and are more effective in situations where they have background and experience to fall back on or in jobs requiring a repetitive nature.

Unexpectedly low scores may warrant further attention. They may indicate other problems such as reading difficulties, lack of attention, or misunderstanding of instructions.

B. Self Control

This section evaluates an individual's conscientiousness and behavior in meeting job demands and responsibilities. The factor measures a person's behavior related to planning, organizing, goal-setting and following through with commitments. It measures their consistency of behavior – will they do what they say they will do? It also measures their consistency regarding follow-through and follow-up. Higher scorers have strong potential to be guided by organizational rules and to conduct themselves in a scrupulous manner. Therefore, in evaluating job candidates, the following scores should be taken into consideration.

More Casual					More Constrained				
potential concern			question	desirable			question		
1	2	3	4	5	6	7	8	9	10

- Scores above 9.0 may be black or white thinkers and too inflexible.
- A score between 5.0 and 9.0 is desirable.
- Scores between 5.5 and 5.0 are considered questionable.
- Scores less than 3.5 raise potential questions about dependability.

Low scorers may be prone to act impulsively or against their better judgment. Likewise extremely high scorers may be too inflexible.



3. PERFORMANCE FACTORS cont.

C. Workplace Coping Skills

This section evaluates a person's resilience, including how well they manage the stress and rigor of being faced with frustration and disappointment. It relates to how well they remain cool under fire and bounce back from setbacks. People who score higher tend to be less inclined to get upset easily and are likely to bounce back quicker from setbacks or challenging situations. Higher scores indicate a greater degree of personal resourcefulness and adaptive potential to respond well to job demands and frustrations.

Less Resilient			More Resilient						
potential concern			question		desirable				
1	2	3	4	5	6	7	8	9	10

- A score of 5.0 or greater should be considered positively.
- Scores between 3.5 and 5.0 are considered questionable.
- Scores less than 3.5 suggest low frustration tolerance.

People who score lower tend to be more emotional and may not always handle stress or bounce back as quickly as they should. Low scorers often exhibit tension, anxiety, or reduced coping skills that are likely to interfere with work and productivity and should be considered cautiously. The potential exists for very low scorers to be overwhelmed by the challenges and responsibilities of the job. They may be unable to roll with the punches and can become less effective when stressed in the work environment.

D. Interpersonal Skills

This section refers to a person's social orientation or their outgoing, enthusiastic nature, as well as their interest in working with people. It also measures how comfortable they are in social settings and assesses their communication style. It presents a basis for how likely they are to listen and ask questions or more inclined to tell and sell. In jobs requiring relating to peers, subordinates, supervisors, customers and clients, higher scorers tend to be more effective.

More Introverted					More Extraverted				
potential concern			questionable		Desirable				
1	2	3	4	5	6	7	8	9	10

- Scores of 5.5 or higher are desirable for jobs requiring relating to others and/or where interaction is a primary function.
- Scores between 3.5 to 5.5 may be considered acceptable for customer service but are questionable for sales roles.
- Scores less than 3.5 do best in occupations that do not depend on the quality of interpersonal relationships.



3. PERFORMANCE FACTORS cont.

D. Interpersonal Skills cont.

Low scores would raise questions as to an individual's involvement or activity with others as it relates to selling to the customer, or servicing the customer. They may be too detached from building the relationships necessary to grow the business. Scores less than 3.5 will raise questions as to whether the individual has enough social and interpersonal skills to be successful in such a role.

E. Drive / Influence

Drive/influence relates to the competitive attitude with which people approach tasks. It includes how comfortable they are in social situations and how they will approach, persuade and influence others. It also speaks to how oriented to change they are, and whether they will be innovative and willing to challenge the status quo. High scores suggest an individual, who is competitive, driven, seeks challenges and opportunities and enjoys controlling events. High scores also suggest individuals who are confident and comfortable taking strong positions. Extremely high scorers are competitive and potentially aggressive in their approach and orientation. They can be antagonistic, not always using their aggression constructively.

More Accommodating					More Independent				
potential concern			question		desirable			questionable	
1	2	3	4	5	6	7	8	9	10

- Scores greater than 8.5 may be too aggressive to be effective.
- Scores between 5.0 and 8.5 are advised for sales and managerial roles.
- Scores between 3.5 and 5.0 are marginal for sales and management.
- Scores less than 3.5 suggest a meek or an overly group dependent persona.

Low scorers are generally cooperative and easy to get along with; they may not take enough initiative to drive things to a meaningful end. Scores less than 3.5 should be considered questionable in terms of assertiveness necessary to succeed in sales or management.



3. PERFORMANCE FACTORS cont.

F. Tough-Mindedness:

Tough-Mindedness identifies whether an individual will be comfortable and inclined to enjoy selling concepts, ideas and intangible or a more comfortable with facts, figures, numbers and data. High scorers tend to enjoy dealing with facts and figures and are more analytical. This rational approach has disadvantages in situations that involve solving problems related to people, attending to feelings or thinking beyond a concrete situation to develop new ideas and solutions.

More Intuitive							More Practical		
questionable			desirable				questionable		
1	2	3	4	5	6	7	8	9	10

- Scores of 7.5 or higher should raise question as to whether the person may be too set or fixed and may even be closed to other points of view and/or new experiences.
- Scores between 3.5 and 7.5 indicate a desirable range.
- Scores less than 3.5 may suggest an individual who arrives at judgments more on what “feels right” instead of logical analysis.

Low scorers prefer to use their imagination and tend to be more creative and interested in feelings.

4. AREAS OF POTENTIAL CONCERN

This section is designed to help you assess the potential hiring liability of a candidate and help spot any behaviors that could bring into question an individual’s ability to perform ANY job. Use this Information to help carefully assess any potential hiring liability, decide whether to conduct a group interview prior to a final hiring decision, or obtain additional information to help make a more informed decision.

There are 15 areas of potential concern. In general, one area of concern is not unusual, but more than one is rare among highly successful employees. Some areas are of more concern than others. For instance, low frustration tolerance (C-) is a more significant issue than excessive worrying (O+). The section will automatically flag and interpret these areas for you.



4. AREAS OF POTENTIAL CONCERN cont.

When two Areas of Potential Concern are present, the hiring manager should assess how critical these factors may be to the particular job. If the factors are highly relevant, then consideration should be given to other candidates as well.

Consider very carefully any candidate with two or more Areas of Potential Concern. If a decision to hire is made there should be additional information to support the candidate's fit for the position. There should be supportive material from other sources (e.g. background investigation, second interviews, and reference checks) to validate a positive hiring decision.

Having no areas of potential concern does *NOT* necessarily indicate suitability for a specific job. Further evaluation of The Sales Personnel Report 2.0 is necessary to determine job fit.

15 Areas of Potential Concern

Social Withdrawal (A-) This trait suggests a person may experience significant reclusive tendencies and isolation due to a pronounced concern or discomfort in interacting with others. When around other people, personal tension can override other priorities. This person is likely to be viewed by co-workers as cold, aloof, distant or even "robotic." This factor may not be as important if a person works in relative isolation or if the job does not require a high level of interpersonal contact.

Low Reasoning and Problem Solving Ability (B-) this trait suggests a person is a hands-on learner with a more concrete learning style. This person may need more time to reflect, and does better in situations where they have background and experience to fall back on or in jobs requiring a repetitive nature.

Low Frustration Tolerance (C-) this trait suggests a person is easily overwhelmed by the challenges of the day and is sometimes unable to function effectively, under moderate levels of stress and tension or frequently changing priorities. This person can get upset over relatively small issues at the office, and will have difficulty "bouncing back" the next day after being upset.

Submissiveness (E -) this trait suggests a significantly passive style, with a tendency to harbor resentment. Because there may be problems with initiative, achievement, and participation, this employee is often unable to discuss frustrations openly and consistently. Such a person experiences things as happening to him or her rather than because of him or her.



4. AREAS OF POTENTIAL CONCERN cont.

Low Energy (F-) this trait suggests that the person may be somber and pessimistic about what life can offer. This employee may have a lack of energy. Good ideas may come and go, but this employee will not often risk trying something new. Pessimism can result in progressively lower standards of performance.

Unconventional Attitudes (G-) this trait suggests a person's reluctance or difficulty in conforming to expected group behavior. This employee is frequently out of touch with and often unaffected by prevailing standards. As a result, he or she may not function well in a typical, conventional work setting. Rules may not always be followed to accomplish goals.

Shyness (H-) this trait suggests a person may often be withdrawn, passive and even uncommunicative. This employee prefers to operate out of the limelight. He or she is likely to experience problems with initiating interpersonal contact, for example, feeling especially uncomfortable in a sales situation or position with high interpersonal visibility.

Suspiciousness (L +) this trait suggests a person possesses the potential to be questioning, blaming, mistrustful, and irritable to co-workers. This person can assume he or she is being taken advantage of. Such persons are unusually sensitive to who holds the power in a given work context.

Too Impractical (M +) this trait suggests a person may have too little interest in the day-to-day issues of life, which can undermine the individual's effectiveness. This person does not always take the demands of reality into account in his or her decision-making.

Worrying (O +) this trait suggests a person may fear making mistakes and may be prone to excessive worrying about inconsequential issues. This employee may likely voice his or her poorly defined worries to co-workers for support, or have trouble in taking initiative for fear of being held to blame.

Too Closed To Change (Q1-) this trait suggests an avoidance of new experiences and new ideas. This individual may lack the flexibility that is necessary to adapt to novel circumstances and unforeseen demands.



4. AREAS OF POTENTIAL CONCERN cont.

Not A Team Player (Q2+) this trait suggests someone who is a loner, and who likely has trouble collaborating with others. This person is more effective under solitary conditions and may not know how to handle work relationships.

Disorganized (Q3-) this trait suggests someone who may be inconsistent, with below-average, goal-directed behavior in meeting responsibilities. He or she may also lack good habits and organizational strengths.

5. WORK-RELATED PERSONALITY DESCRIPTION

The section presents the Performance Factors of a person's personality in a narrative form. Many of the descriptors for the factors are expanded upon, especially in reference to the way personality "plays out" or "manifests itself" in the work setting. Every narrative begins with an appraisal of adaptive capacity. That is, of the individual's personal resourcefulness for effectively coping and positively responding in the work setting. Some people are much better at deferring needs than others; they are better at coping with situations that frustrate their own preferences. If adaptive capacity is low, Areas of Potential Concern and mismatches between personality and a given job are even more of a concern.

The work-related narrative profile will suggest lines of thought and inquiry not apparent in a standard personnel interview. This information, can be integrated with other sources to match applicants to jobs optimally. Carefully read through the narrative sections and highlight areas that raise questions for subsequent interviews or to aid in validating references.



6. PROFILE VALIDITY

The Profile Validity section, located at the end of the Work-Related Personality Description, provides some information about the applicant's test-taking orientation to the questionnaire. The Sales Personnel Report 2.0 is equipped with three distinct validity scales. Impression Management, is the tendency of the applicant to try to conform to societal expectations of making a good impression while taking the personality test. It is a person's slant on themselves. It is normal for job applicants to try to look their best especially in sales, so they will usually score above average on the Impression Management scale.

A second scale, Infrequency, is based on the number of times the individual selected the "b" response or "?" alternative to one of the item stems (questions), for items that most people readily make a decision on. High scores on this scale correlate with indecisiveness, possible reading problems, concentration difficulties, or non-compliance.

A third scale measures the person's tendency to agree, indiscriminately, with items on the test. This is a measure of Acquiescence, and high scores here may also relate to reading or concentration problems.



APPENDIX A

FOUR STEP PROCESS TO INTERPRETATION

√

Primary Personality Factors Graph (PSG for Sales)

Shaded Areas are Desirable Ranges

- How many characteristics fall outside the suggested sales ranges?
- Are these characteristics “must haves” for success in the position?

√

Performance Factors (Sales)

4.5 and above is recommended for Workplace Coping Skills and Self Control - other Factors see graphs for desirable ranges and cutoff scores.

- How many performance factors fall outside the desirable ranges? For those that do, are they necessary for success in the position/territory you are offering?

√

Areas of Potential Concern

2 or more suggests you look further

- How many areas of potential concern does your candidate have?
- Will these areas be critical in the position you are considering?

√

Work-Related Personality

More detailed description of Performance Potential

- Highlight any areas that raise concern for you to investigate further.
- Formulate questions to probe deeper into these problem areas to confirm job fit.

Use the **FOUR Step Process** above to evaluate your candidate's potential. When any scores are marginal or questionable, or even outside the recommended ranges further exploration is highly recommended. Spend additional time to conduct thorough background checks, second interviews, or interview past supervisors regarding questionable scores before you make a final offer.



APPENDIX B

RICK'S QUICK TIPS

In hiring Salespeople I do a quick step analysis in addition to using the features in the new Sales Personnel Report 2.0.

STEP 1

Look at Factor B: This is an indication of problem solving ability - the higher the better. It tells me they will grasp concepts quickly and they are quick studies.

STEP 2

The First 7 Factors (A – H) should be 6 or greater. Studies including our Validation Study have found there is a 90% probability the candidate will be successful when these scores are 6 or greater. Factor E measures Assertiveness: carries the highest correlation to success. It tells how much drive a person has.

STEP 3

Look at Factor E and Factor Q1 - Ideally both should be greater than 6: Factor E indicates the will to win and level of competitiveness.

Factor Q1 indicates their need for change. As an alternative look for an E of 8-9 and a Q1 of 5 -or- an E of 5 and a Q1 of 9-10. These are still positive indicators.

STEP 4

Look at Factor G (ability to follow rules) **and Q3** (attention to detail). These are key indicators for an Account Rep because they represent a more of conscientious, organized nature. I like to see both these scores 6 or greater for an Account Rep.

PROFILE VALIDITY (Also refer to page 16 of the User's Manual)

Impression Management: Represents a person's slant on themselves. High scorers indicate a person may be trying to make a favorable impression.

Infrequency: a score higher than 10 score may suggest the candidate may be trying to hide something or may be indecisive.

Acquiescence: High scores indicate the candidate answers True on everything. He may not be interested in taking the assessment or there may be problems comprehending the questions or other concerns.



APPENDIX C

16 PRIMARY PERSONALITY FACTORS GRAPH (SALES)

		1	2	3	4	5	6	7	8	9	10		
A	RESERVED Unengaging, distant											SOCIABLE Engaging, friendly	A
B	LOW VERBAL FACILITY Poor grasp of concepts											HIGH VERBAL FACILITY Good grasp of concepts	B
C	EASILY UPSET Job should fit needs											MANAGES FRUSTRATIONS Can adapt to job	C
E	SUBMISSIVE More passive, humble											ASSERTIVE Confident, competitive	E
F	SERIOUS Sober, somber											ENTHUSIASTIC Happy, energetic	F
G	UNCONVENTIONAL Ignores expectations											CONVENTIONAL Follows rules	G
H	SOCIALLY RESTRAINED Shy, avoids spotlight											SOCIALLY BOLD Needs to impress others	H
I	TOUGH-MINDED Realistic, no-nonsense											SENSITIVE Susceptible to feelings	I
L	TRUSTING Accepting, naïve											SUSPICIOUS Skeptical, blaming	L
M	PRACTICAL Focus on solutions											IMPRACTICAL Focus on ideas	M
N	DIRECT WITH OTHERS Self-disclosing, open											INDIRECT WITH OTHERS Discreet, diplomatic	N
O	UNCONCERNED Casual, untroubled											WORRYING Fear of mistakes	O
Q1	RESISTS CHANGE Prefers the familiar											OPEN TO CHANGE Experimenting	Q1
Q2	WORKS IN GROUPS Collaborative											WORKS ALONE Not a team player	Q2
Q3	LESS ORDERLY Can be undisciplined											MORE ORDERLY Perfectionist	Q3
Q4	PATIENT Relaxed, Calm											IMPATIENT Tense, driven	Q4

Scores in the generally most desirable range for Sales positions fall within the shaded areas. Scores outside the shaded areas may indicate a mismatch with the Sales position.