



PPA XL MANAGEMENT ASSISTANT/SECRETARY: Susan
Sample (secretary)

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Private and Confidential

SELF IMAGE - GRAPH III

Susan is specific, thorough, accurate and dependable. She is not a very sociable individual but nevertheless she wishes to belong to an "organisation" where she can work equally well alone or within the group. She is non-aggressive and will normally yield her position in order to avoid antagonistic situations or interpersonal conflict. Susan is not particularly decisive. She likes to investigate all possible solutions and the consequences of any action she may take prior to implementation.

She has a tendency towards perfectionism and will try to avoid risk at all costs. Her need to work at her own pace may well frustrate people who are quicker and more energetic. Susan will normally forgive others, but may not necessarily forget. She is a patient and good listener. However, because she is not demonstrative, she may be seen as being somewhat aloof and withdrawn.

Susan can apply herself to routine and repetitive work, particularly if it is of an administrative or service nature. This logical, serious individual will work industriously towards maintaining high standards and specifications. She will avoid making decisions, particularly quick ones or those which are likely to put her in controversial situations. Susan will always attempt to maintain the status quo and has the ability to calm excited people.

SELF MOTIVATION

She is motivated by security, standard operating procedures, clearly-defined responsibilities and a structured working environment. She prefers to complete one task at a time and work at her own pace.

JOB EMPHASIS

Specialised Administrative and Technical Support

The main requirement of the function should be the provision of specialist or technical leadership. The job should allow her to manage at her own pace and there should be little need for her to cope with rapidly changing deadlines. Authority will be vested in

expertise and should call for a natural ability to motivate and discipline others who share the same values, norms and skills. The job should require her to set high standards and to ensure that others maintain the required levels of quality. Preferably, she will be expected to manage using her particular and specialised skills or knowledge.

DESCRIPTIVE WORDS

Detailed, precise, dependable, thorough, serious, logical, hard working, persistent, quiet, non-aggressive, accurate, cautious, careful, good listener, non-antagonistic, inquisitive, probing, suspicious, asks "why" and "how".

WORK MASK - GRAPH I

Susan is modifying her behaviour slightly within the current work situation.

She is trying to quicken her pace and increase her mobility and activity, but this change in behaviour is fairly minor and may not be noticeable to others.

Susan will still be seen as someone who is naturally thorough and accommodating.

BEHAVIOUR UNDER PRESSURE - GRAPH II

Whilst the self-image suggests that Susan is steady, thorough and dependable, all the indicators suggest that she may have a mercurial change in behavioural style. Initially when pressure is placed upon her, she increases her natural characteristics, but if continued extreme pressure is exerted on her, she is likely to reverse in behaviour. As a result she may be seen as restless, even tense and anxious. She may also be seen as somewhat volatile.

Although this would only be a temporary situation the change of style should be assessed.

Motivators

Susan is motivated by historical procedures, sincerity, and time to adjust to change. Limited exposure and security by way of a sheltered environment and protection within the job are equally important to her.

Should Susan have a boss, then ideally that person will be a democratic leader who gives reassurance by providing structured information together with clear instructions, rather than a superficial approach. Support should be provided particularly in setting up new procedures or changing existing methods. There may be occasions when help should be

given to speed up the decision making process.

This report summarises Susan's positive behavioural traits which can be interpreted as her "Working Strengths". These are the values that she contributes to the organisation. It also includes "Possible Limitations" which describe those driving forces which may be seen by some as personal shortcomings.

Susan's strengths are a clear indication of those areas of accountability or operational involvement where she would likely be most comfortable and therefore most productive and successful. Conversely, the indicated limitations highlight those areas where Susan may, in all probability, benefit most from training, development and/or support.

Working Strengths of Susan

- Hard working and dedicated to quality
- Thorough, ties up all loose ends, ensures accuracy and meticulousness
- Sincere, loyal team member; helpful and accommodating nature
- Logical, practical and critical assessor of facts; cautious decision maker
- Often shows astute judgment of people and situations
- Persistent and steady when under pressure; remains unruffled and has a calming effect on others
- Patient and empathetic listener
- Diplomat who tries to prevent conflict or confrontations
- Creates structure, routine and predictability in the environment
- Supports systems and procedures
- Strong administrator; can concentrate on repetitive or routine work with little interruption or variety
- Able to absorb detailed, complex and highly technical information
- Good at maintaining smooth relations and cultivating enduring relationships

Possible Limitations of Susan

- Can be inflexible in work pace; dislikes being hurried or forced to cut corners
- Slow to respond to opportunities; may lack a sense of urgency
- Needs time to adjust to change; clings to the status quo; prefers to tolerate difficulties than consider change
- Perfectionism can lead to inappropriate priorities at times which could jeopardise deadlines
- Accommodating nature may be taken advantage of
- May be hesitant to voice concerns, doubts, fears and not address problems in general
- Needs help in getting projects and assignments started; may be seen to lack drive and initiative at times
- Will seldom take an independent and firm stand in the face of aggressive challenge
- Finds it difficult to discipline and motivate others on a daily basis

- Needs considerable support in taking or implementing tough decisions or those which may lead to confrontation
- Not really profit-orientated
- Satisfied with things as they are

OPENING AND COMMUNICATION

Susan may find opening difficult and struggle to establish an early rapport. Her opening approach is likely to be tentative and to some extent distanced. She will tend to avoid probing for possible needs and concentrate on thoroughly explaining the features and applications of her product. Susan is unlikely to make any claims for her product or service that she cannot personally support. In this sense, she is usually seen as sincere and can engender an early sense of trust. However this somewhat down to earth product oriented approach tends to miss the prime purpose of good opening, which is the relief of tension and the securing of sufficient common ground to proceed with the meeting. Indeed Susan may often prefer to secure the opportunity of a second meeting at an early stage, with the intent of building a relationship via the medium of the courtesy call. Her opening style is, however, relatively well suited to technical explanation. She may find it easier to establish early common ground when representing a specialist or technical product.

Susan's style of communication is unobtrusive and is unlikely to antagonise. However it may be more factual and detailed than is necessary, and could cause frustration in those of a more impatient and direct nature.

Thus in the general sales sense, opening is unlikely to be a strength.

PRESENTATION AND COMMUNICATION SKILLS

Susan is a factual communicator who prefers doing so in writing. Her presentations will be well-organised and thorough but somewhat slow paced and at times over-detailed. She has a tendency to avoid drawing specific conclusions and taking decisions outside her area of specialisation. This could irritate clients who are expecting a bottom-line proposal and real assistance with regard to decisions that need to be taken. Her presentation and communication style will tend to be unemotional and overly concerned with technical detail.

CUSTOMER SERVICING

Susan's natural characteristics suggest that she will enjoy servicing. Her regularity of call and ability to monitor her client's product usage and subsequent need, will often secure

unasked for orders. As a result of her sincere and non-demanding approach, her clients frequently come to rely on her for advice, not only on her own products but also those of her competitors. There is little doubt that customer servicing will be seen as her strong suit.

ADMINISTRATION

Susan has many of the natural attributes required for effective sales administration. She tends to keep excellent customer records and is able to monitor the administrative needs of her clients. In the more general administrative sense she will follow procedures, tie up the loose ends and see a task through to its logical conclusion. She may on occasions, spend too much time on administrative detail but will, in the main, use organisational procedures to enhance her sales effort. It is, therefore, very likely that administration will be seen as a sales strength.

GOAL ORIENTATION

There is a strong drive to achieve high standards and maintain very structured and regulated work processes. Outside her area of expertise Susan may be reluctant to take responsibility. She is motivated by stability, security, accuracy and consistently high standards.

UNDERSTANDING CLIENT NEEDS

Susan's supportive nature is well suited to servicing clients. She possesses attentive and disciplined listening skills and will apply these effectively in gaining a comprehensive understanding of her clients' needs. Because of her probing, analytical and investigative approach she enjoys fact finding and will insist on doing so in order to fully understand the client's requirements. She will methodically and patiently analyse every option and this may require a considerable amount of time. This perfectionistic process may irritate certain clients. She is sensitive to the needs of others but will prefer to deal with issues based on fact and logic rather than emotions. Susan is inherently helpful and will assess the situation objectively. She will strive to interact with clients on an on-going basis where long-standing relationships can be developed.

HANDLING CRITICISM AND AGGRESSION

This quiet, serious and sensitive person is non-aggressive and amiable by nature. She dislikes confrontation and may prefer to yield her position in order to maintain a harmonious and productive working environment. She can be conservative and

diplomatic and will accommodate others' views whenever feasible. Susan has a calming influence on others and is highly sensitive in her approach. In areas of her own expertise, she will defend her standpoint using facts and figures and in this way, overcome client objections.

RESPONSIVENESS

This dependable and highly perfectionistic individual will be well informed with regard to the client's products, services and operations. Susan will, however, resist sacrificing quality to meet unrealistic deadlines. She prefers to work at her own pace, is diligent at "tying up all loose ends" and is likely to respond more timeously to those clients whom she knows well and with whom she has a good understanding.

CREATIVITY AND PROBLEM SOLVING

Susan has good abilities in researching and gathering detailed information but may not be particularly creative in applying it with regard to problem solving. She will, to a large extent, rely on precedent and will be both logical and conservative in her methodology. She will become even more cautious and hesitant in areas outside of her expertise. Susan is likely to choose solutions and proposals that can be readily supported and confirmed by factual evidence. Innovativeness and critical problem solving could well be one of Susan's limitations.

ORGANISING WORK FLOW

Susan strives to increase the efficiency and predictability of her work environment by implementing systems, procedures and a degree of routine. She likes to know exactly what is expected of her and strives hard to meet those requirements. She works in a logical, methodical way, preferring to complete one task before starting the next.

She tends to be quiet and unassuming and, although she is amiable and diplomatic, she prefers not to have to interact with strangers on a regular basis. It is important for her to be a valued member of the team. She seldom assumes authority outside her area of expertise. Her high standards make it difficult for her to delegate comfortably as she is concerned that the quality of work might be put at risk.

She is capable of working at repetitive, routine work, but needs the opportunity to apply her logical, analytical, detail-oriented mind to problems in her area of speciality.

MEETING DEADLINES AND TIME MANAGEMENT

Susan sets high standards for herself and others and this, together with her planned, methodical manner, results in her having a dislike of time pressures, on a regular basis. She needs to be able to concentrate on working thoroughly and meticulously. Although she generally tries to accommodate the needs of others, she becomes frustrated and demotivated if hurried and expected to cut corners.

She measures her performance by the consistent accuracy and thoroughness of her work, building her credibility on being dependable. She, therefore, dislikes risking work quality and as a result, tends to concentrate more on that, than on meeting the deadline. She may resist taking responsibility for work which she is pressurised into hurrying.

She needs time to plan ahead in detail and to be allowed to work uninterrupted and in a systematic way. Her superior may need to provide support in prioritising, especially since this person dislikes compromising the daily routine for the sake of deadline-related tasks.

ENSURING QUALITY AND ACCURACY

Susan sets a high priority on consistently presenting work of a high standard, judging herself and others by this. She will seldom compromise the quality of work and may become demotivated if expected to work more quickly and with less attention to detail.

She tends to plan her time and resources carefully and is then diligent and disciplined in adhering to the plan. Frequent, last minute changes to the plan or new demands also frustrate this person, especially if she perceives that the reason behind them is lack of organisation and consideration.

Though she works and tries hard, she is susceptible to others taking advantage of her dependable and kind nature.

MEETING INFORMATION/SERVICE NEEDS

Susan is normally helpful and accommodating, trying hard to meet all the requirements of an assignment or project. The combination of her thoroughness and dependability generally results in a high level of support being given to others. She has natural listening skills, being both patient and analytical and she takes care to fully understand what is expected of her before acting.

Although she may seem quiet and serious, she is generally non-aggressive and amiable. She may have difficulty in situations involving meeting a variety of people, where an outgoing, gregarious personality is more at ease. However, this person normally elicits

the trust of others quickly. She prefers to deal with people on an on-going basis and usually develops enduring relationships.

She is thorough and accurate in researching information and is capable of working with technical or detailed data. She prefers communicating in writing but although the information will be correct and logically presented, it may lack enthusiasm and be too detailed and technical. She could avoid drawing any conclusions until she is more certain of the opinions of others.

MANAGING

Susan responds well to a procedural, but relatively relaxed managerial approach that is supported by well defined rules. While she is not particularly gregarious, she will seek the security and reassurance of belonging to a team. Her manager should involve her in group activities. However, she tends to dislike being pushed to the forefront.

It is important that her manager provides an informal but procedural consultation structure and encourages her to use it. She responds well to a boss who shows a personal interest in her work and well being.

Monitoring should take the form of established reporting, progress and time schedules. Indeed, lack of regular (not excessive) supervision is likely to be interpreted as a lack of interest. The key to the effective management of Susan is focus through rules and guidance.

MOTIVATING

Susan is motivated by a sense of worth, continuity, reassurance, limited exposure, security of position, personal interest and a sense of belonging.

Her manager can underpin the foregoing by the provision of a contract of employment, structured environment, defined responsibilities, roles related to her expertise, overt recognition of skills, frequent appreciation and identification with the company.

Incentives should recognise individual contribution (specialist skills), team effort, loyalty, dependability and maintenance of standards. Incentive rewards should be of a practical or classical rather than glamorous nature. Remuneration should include fringe benefits such as company assisted pension and health care.

COMMUNICATING

Susan responds well to an even paced, logical but relaxed communication style that is specific and explanatory. It is essential that any communication explains the purpose and reasons as well as requirement.

Despite her somewhat reticent manner and indeed because of it, her boss should, where possible, communicate on a one-to-one basis. Where this is not possible, flag and personalise any parts of a general communicate that apply to her.

Detail and instructions can be communicated verbally. However, they should also be confirmed in writing, along with terms and conditions. The keys to effectively communicating with Susan are thorough explanation, clarity and logic. Avoid verbal hype in both verbal and written communications.

DIRECTING

If this person is made familiar with the rules and knows what is required of her, day-to-day control should not pose a serious problem. However she can allow others to impose, and as a consequence she can be distracted from her own work.

In addition, she is inclined to get bogged down in excessively detailed preparation and checking. Her boss must therefore monitor her work load and clarify and emphasise time schedules.

SUPPORTING

She can be rather nervous of change. Her manager can provide support by preparing her for change well in advance of its implementation, reassuring her that such changes will not detrimentally affect her security.

Susan may need help getting started. Thus, the provision of effective start up procedures and proven short-cut methods will normally be appreciated.

She can struggle with decision taking, particularly in crisis situations. Her manager can provide support by encouraging her to suggest rather than decide. However, where expediency is important, the most effective form of support is direct intervention.

DELEGATING

When delegating to this person, clarity of purpose and detailed explanation or

requirement are essential. Susan tends to respond well to roles that require her to support and help others the team through the use of personal expertise.

Delegation should be formal rather than casual. A, "could you just do this", "will you please", will not suffice. Indeed, such an approach can lead to anxiety, resentment and lack of commitment. She needs to know what is required, why, for whom and when?

DISCIPLINING

The need to discipline will normally be minimised if her contribution and co-operation to the organisation is made apparent. This should be supported by a clear set of rules, identifying unacceptable behaviour.

Should the need to discipline arise, all appropriate procedures should be followed to the letter. A formal, explanatory, but not authoritarian approach should be adopted. Susan will normally expect any disciplinary action to be commensurate with the offence. However, she is unlikely to view leniency as a weakness.

DEVELOPING

Susan is often an extremely competent administrator, organiser and planner. She tends to respond better to hands on, rather than theoretical or classroom training. She normally responds well to any training related to support roles, particularly if it emphasises the development of technical or specialist expertise.

Training to improve people and presentation skills could prove worthwhile. However, such training should be gradual rather than concentrated. Whilst assertiveness training may appear desirable, there is unlikely to be long-term benefit.