

## **Financial Report**

**Name:** Tony Sample

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They are in the top third of the population in terms of reasoning speed. Their ability to project the consequences of actions quickly is the basis for strategic thinking. In a Financial position, they will generally be more focused on strategic and long term issues rather than on the more immediate or tactical decisions. It is also probable that their grasp of abstract concepts will be faster than that of the average person. They must translate these concepts into practical applications for them to be understood by most members of their work group.

In training situations, they will learn more quickly than the average financial person. In most formal training programs, they may feel that the pace of the class is too slow. It is important that they use their advantage of learning speed to focus on more application of the training information that is provided instead of wanting more information. In training situations that allow for individual pacing, they should be allowed to progress at their own pace, although still focusing on application.

This faster learning and reasoning speed enables them to solve problems quickly, and this can be a benefit in terms of financial analyses and projections. This is well-suited for financial positions that involve dealing with a challenging range of issues. This problem solving ability essentially involves their faster projection of the consequences of their choices. This also allows them to think of a wider range of alternate solutions. Their focus on the strategic issues can be a problem at times when the tactical or operational issues are more critical. They see so clearly where things need to be that they may underestimate the challenges and obstacles of the moment. Businesses must have a clear vision of where they are going, but it is equally important to deal effectively with the needs of today. It is important that they have good tactical thinkers to support them in this area. It is also important that they supply others with the trail of reasoning that supports their vision. A faster learning speed allows them to essentially take shortcuts in their thinking that may not be apparent to others. This can even lead others to view their thinking as incomplete or impulsive, since the logic is not clear to them.

It is critical that they understand their inherent communication problem: They process information faster than the average person. Therefore, they tend to communicate information faster than the average person can acquire it. It is essential that they learn to slow down and match their delivery to their audience. It is a good thing to encourage their listeners to ask questions often, and they should continually confirm that what they heard is what they intended. They must also ensure that their instructions are complete, providing all of the information and reasoning necessary

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for others to do their jobs.

It is important that they recognize that much of every financial job involves the consistent application of proven processes. It is easy for them to become bored with this routine if the job lacks sufficient challenges for them. They must provide some measure of those challenges with outside interests or hobbies in order to balance the necessary routines of their job.

They are very flexible in terms of following established rules and procedures. They handle change very easily and can operate with little structure. They generally have a lot of creative ideas for changing the way things are done. Their flexibility is a problem in terms of ensuring consistency with financial procedures. Most financial positions demand compliance with established practices and in fact, act as the foundation of consistency for the organization. They tend to see each situation as different, and therefore, they tend to treat each one differently. This promotes an inconsistency that can result in serious difficulties for the business.

They enjoy talking and interacting with others. Co-workers will usually view them as friendly. They have the ability to communicate enthusiasm to others in person or over the telephone. It is difficult for them to work alone. At times their socializing may be distracting to their co-workers. It is important that they choose appropriate times for this. Success in a financial role involves dealing with information accurately. When dealing with customers or co-workers, they often do not listen well, and it is necessary for them to develop effective strategies for strengthening their listening skills. Taking notes and asking questions to verify their understanding of what is said are good examples of such strategies.

They handle confrontation easily. They call out problems and state their opinions directly, even if those opinions are unpopular. Since many financial positions must provide critical information on key things like cash flow and accounts receivable, this directness will usually ensure that management is informed of potential problems in a timely fashion if the financial staff is competent. In a collections role, they can handle stalls and objections effectively when trained adequately. They may sometimes speak too quickly, and at times, they may become argumentative with others. It is important that they recognize when this is not appropriate, particularly in collection situations. They prefer to control their environment, and this may not be possible in some financial positions. It is important for them to recognize when it is necessary to simply follow instructions.

Their competitive nature usually gives them a strong drive to succeed. They have a need to do better than others and respond well to individual motivation. Many times financial positions depend upon cooperation and teamwork. At times, they can become discouraged if there is no opportunity for individual achievement and recognition. Their desire to excel can make them somewhat defensive in terms of admitting weaknesses or problems. They can sometimes become impatient with others who they feel do not learn as quickly as themselves.

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They function best in a calm environment with little stress. They are generally skeptical and this causes them to question information and seek verification. At times, this is important when dealing with financial data and decisions. They tend to stay busy. They are sensitive to stress, and at times, they may have an exaggerated sense of urgency, treating everything as a crisis. It is important that deadlines are stated specifically to avoid these emotional reactions. It can be difficult for them to sit still without regular activity to manage their extra energy. Sometimes their skeptical nature can be seen as a negative attitude by others.

They are moderately detail-oriented. While this is sufficient for most jobs, many financial positions demand a very high attention to detail. In those circumstances, it will be necessary for them to double check their work and minimize distractions. They generally plan and prioritize their work adequately, provided they have acquired effective time management skills.

They have answered the questions frankly and directly.