



**THE PEAC  
SYSTEM, INC ®**

*Finding, Training & Keeping 'Em*

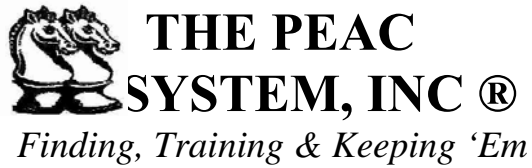
**CONSULTANT ACTIVE SITUATIONAL  
EVALUATION (CASE Studies©)**

**INTRODUCTION PAGE  
FOR MANAGER/OWNER**

Our CASE Studies© clients are split almost down the middle between perm services (direct hire) and contract/temporary. To receive the added benefit of the evaluation, it is important that you, as owner/manger understand that we are not assessing the candidate's ability to do the job in question, but rather, the communication style of the candidate. In other words, has the candidate developed instincts either to complement, or to contradict the PEAC SYSTEM® evaluation we have in question? The only time actual performance is critical is when the individual has previous experience, for then the expected performance should rise.

As such, whether the CASE Studies© is temp, contract, perm or general sales oriented has little bearing on the results of the evaluation. It just so happens that we have a strong validation behind our Personnel Services CASE©, and an equal validation behind General Sales. We are looking for instincts, the ability to synthesize on the fly, willingness to take chances, perhaps even take on the challenges of something they may not yet understand, all valuable assets in any of our three main personnel arenas. This could be either part of the makeup of their communication/personality style, or something they have developed through experience or exposure to business practices in the outside world.

So far, in over eight thousand units to date, we have a consistent pattern across the lines of industry function- those scoring mid level are retained about fifty- fifty. Those scoring less are lost to the tune of nearly eighty percent, and those scoring above the midline are retained to nearly 75%, 91% at the highest score.



## **ADMINISTRATOR'S INSTRUCTIONS FOR MANAGER/OWNER/PROCTOR**

All evaluations are conducted by appointment only, preferably with at least one business day's notice, and depends on availability of THE PEAC SYSTEM®'s Consultant. The CASE Studies© program takes one hour, and can be scheduled between 8:00 and 5:00 pm (to finish at 6:00 pm) eastern time. Off-hour appointments and weekends may be made, again upon availability of THE PEAC SYSTEM®'s Consultant, and will require a \$50.00 surcharge. Also, charges may occur for cancellations made within four hours of the appointment time, as described under cancellation paragraph herein. Please call THE PEAC SYSTEM® at (813) 634-5404 for information and scheduling appointments. Any candidate for the CASE Studies© program must have a PEAC System® evaluation run prior to the CASE Studies©. To avoid penalties, CALL our office for cancellations or rescheduling well before the four hour limit...

### **FUNCTION OF THE CASE Studies©**

All calls are made into the evaluator to simulate regular work conditions in your office. In the event you are assessing; a salesperson, there should be times that the individual spends in phone work as well as outside. Our staff cannot accept collect calls. Our call period for this evaluation is one hour, although the candidate is to continue making calls until the evaluator tells him or her to stop. This allows the evaluator to conduct a summary discussion at the end of the program. Due to the preparation work required of your candidate, have him or her arrive fifteen minutes prior to the scheduled appointment time. The candidate then learns how to use your phone, settles down in your environment, and reads the initial instructional materials. At the appointed time, hand the candidate the three sealed envelopes, which you should have prepared prior to his or her arrival. The candidate immediately opens Envelope #1, and follows the instructions therein. The time from the appointed time to first call allows the evaluator to assess the candidate's preparation and analysis characteristics.

## **TERMS AND CONDITIONS**

### **FEES & PAYMENT**

The CASE Studies© is an added service as stipulated in your PEAC SYSTEM® contract. As such, its fee of \$ 125.00 (plus any surcharges) is due under the same



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terms and conditions as that of THE PEAC SYSTEM® evaluation service, net less 2% if paid within fifteen days, total payable by the fifteenth of the month of receipt of invoice. Late fees will accrue for balances overdue. Your set appointment is acceptance of these terms and conditions.

## CANCELLATION POLICY

Like most of THE PEAC SYSTEM® services, you are buying time. Once sold, it is extremely difficult to find a replacement on short notice, and represents a hole in the revenue stream for our Consultant. Cancellations made within one hour of the appointment time may be subject to a 25% cancellation fee. Subsequent cancellations made within four hours may suffer higher fees, including full fee for cancellations made during our set-up phase for your CASE Studies© session, that period fifteen minutes prior to the appointment time.

## ABOUT YOUR CANDIDATE

The candidate will need an environment free from physical distractions, such as people reaching into or over their space for papers, manuals, and the like, or using phones on their desk space. However the normal environmental noise of the office is not only acceptable, but desirable. In any case, place them where they can be observed. Candidate will need pen and paper for notes and the forms within the envelopes. During the fifteen minute orientation period, the candidate will adjust to the hustle and bustle of the environment, learn to use the phone, and mentally prepare for the evaluation. At the appointment time, hand them all three envelopes and tell them, 'Open only Envelope #1 and follow the instructions inside.' Leave them alone and provide no other assistance unless requested by the Evaluator. This is extremely rare.

**THE FINAL STAGE: RETRIEVE ALL NOTES, FORMS AND MATERIALS FROM THE CANDIDATE AT THE END OF THE SESSION. THERE MAY BE QUESTIONS AT OUR END THAT THESE MATERIALS MAY SATISFY.**

Reports will be in writing, emailed the following business day. Please refrain from seeking a verbal assessment immediately after the session. More than likely, our Consultant will be on another CASE© and will be unavailable to answer your questions. In addition, when several a day are running, the margin for error increases dramatically if your reports are not based on the finished notes, which may take a



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while, depending on work load. Besides, your questions will be far more succinct, should you still have them, after reading the report. There is no need for a verbal, unless you have further questions regarding the CASE©, therefore, we will not call you to follow up, as we do with the PEAC SYSTEM® evaluations.

## **ENVELOPE STUFFING**

The pages, when mailed, are sent to you flat so that you can look them over and get a feel for what your candidate will go through. You will need to separate the important parts into their respective envelopes. Envelope 1 shall have the Recruiting concept and inventory forms for candidates (three sheets). Envelope 2 shall contain the Marketing concept and the Job Order Forms (three sheets). Envelope 3 shall hold the Matching information (two sheets). Seal them, after they are marked, appropriately, 1, 2 and 3, and carefully read the instructions before your candidate arrives. If you have any questions, call us immediately.

The Following are the **Candidate's** information. First a handout, then, AT THE APPOINTMENT TIME, ONLY, the three envelopes...



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**CONSULTANT ACTIVE SITUATIONAL  
EVALUATION (CASE Studies©)**

**CANDIDATE'S INSTRUCTIONS**

Congratulations! You have been selected to take this important step in the process of analyzing your skills for this industry! Should you subsequently be hired, it will give your Manager the information needed to best insure your chances of success, and discover what areas to best focus training and management. But, it is a two way street. If you are new to sales, or to the industry concerned, you will be able to learn a number of valuable things about it, and this will give you an idea of what you are getting into! So far, all you have been subjected to, en route to this evaluation, is 'theory.' We are now going well beyond that, into the 'lab.' Read the following closely, and keep in mind this first caveat: Work with only what you read and what you hear! Do NOT make things or people up as you go along, and respond to the flow of the information you receive!

CASE Studies© was developed and is administered by THE PEAC SYSTEM®, a national consulting firm with over three decades of helping companies select, hire, train and manage people much like you for this industry. If you are new, it will go a long way toward helping you understand the pleasures and the pitfalls of sales. It is important that both you and your Manager come into this arrangement, should you be hired, with both your eyes wide open!

To give you a feel for the business, and us a handle on your unique skills and behaviors, you will be conditionally assessed on a variety of categories: Resiliency, Communications, Persistence, and General Sales Aptitude. You will bring all of these from one or both of two sources: Personality or Environmental (training/experience), either of which will serve you well. But part of the assessment has to do with following instructions, so let's get those under way, right now....

**PREMISE AND RULES**

You are a consultant with PROFESSIONAL SERVICES, INC., a contingency search and placement firm. Contingency simply means you don't get paid unless you are successful in making the placement of an individual into a company. The companies always pay the fee. The first step, however, is to find one or more decent candidates, and to start you will have a basic assignment (often called a job order) to work on.



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**The following are several hints and rules:**

IF YOU HAVE THE THREE ENVELOPES NOW, YOU MUST NOT OPEN ANY OF THEM UNTIL THE APPOINTMENT TIME. AT THAT APPOINTMENT TIME, OPEN ENVELOPE #1, ONLY, AND FOLLOW THE INSTRUCTIONS THEREIN.

OPEN THE NEXT ENVELOPE IN THE SERIES ONLY AFTER YOU FEEL YOU HAVE DONE YOUR BEST AT THE CURRENT ENVELOPE LEVEL.

IF YOU FIND YOU HAVE MISSED SOMETHING AT A PREVIOUS LEVEL ENVELOPE YOU CAN ALWAYS BACK UP.

THIS IS NOT A RACE TO GET THROUGH THE LAST ENVELOPE, BUT AN ASSESSMENT OF YOUR SKILLS AND INSTINCTS AT EACH LEVEL.

YOU CAN ASSUME THE CANDIDATE AND THE ASSIGNMENT WILL BE IN THE SAME CITY (LOCATION) EVEN THOUGH LONG DISTANCE FROM YOUR CALLING AREA.

PLAY OFF WHAT YOU HEAR AND WHAT YOU LEARN AS YOU REACH THE END STAGES OF THE PROGRAM.

CONTINUE MAKING CALLS UNTIL YOUR EVALUATOR TELLS YOU THAT YOU CAN STOP. A DISCUSSION OF YOUR BACKGROUND ALONG WITH APPROPRIATE ADVICE WILL FOLLOW.

**Be sure to turn in all your notes and materials at the end of the program. Your last instruction:**

NOTE: YOU WILL MOST LIKELY EXPERIENCE FRUSTRATIONS AS THE EVALUATOR PROBES FOR STRENGTHS AND WEAKNESSES! REMEMBER, THIS IS A GAME - A SERIOUS ONE, BUT STILL, A GAME! HAVE FUN!!



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## CONSULTANT ACTIVE SITUATIONAL EVALUATION (CASE Studies©)

### Envelope I EXERCISE I- RECRUITING

Your objective is to find at least one candidate starting with a group of three names given you by one Ben Franklin, who once worked at XYZ Corporation. These people MIGHT be able to help you. He referred:

**Sandy Jones      Tony Smith      Chris Green**

You do not know (for certain) the titles of any of these three. Ben thought some were probably still bookkeeper level accounting folks. He no longer works for the company, as he left two years ago. You have a position for a bookkeeper at Fast Freddy's Counting House, where the pay range is \$20,000 to \$25,000, which isn't bad, but the place is a dump. You know that if you can land a good candidate, and Fast Freddie's won't hire them (or they won't go to Fast Freddie's), you could take him or her to the marketplace, and put them in another company. Below, and on the next page are some informational guidelines. When you are satisfied you have done your best with this module, move on to Envelope #2.

### RECRUITING PROSPECT FORM

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_



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**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_





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**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

COMMENTS: \_\_\_\_\_



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**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

\_\_\_\_\_  
SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

\_\_\_\_\_  
COMMENTS: \_\_\_\_\_

**RECRUITING PROSPECT FORM**

NAME: \_\_\_\_\_ TEL # \_\_\_\_\_

COMPANY: \_\_\_\_\_ TITLE: \_\_\_\_\_

YEARS THERE: \_\_ TOTAL YEARS EXP \_\_\_\_\_

EDUCATION: \_\_\_\_\_

CERTIFICATIONS/SPECIAL SCHOOLING: \_\_\_\_\_

RESPONSIBILITIES: \_\_\_\_\_

\_\_\_\_\_  
SALARY: \_\_\_\_\_ LIKES & DISLIKES: \_\_\_\_\_

\_\_\_\_\_  
COMMENTS: \_\_\_\_\_

**NOTES:**



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**CONSULTANT ACTIVE SITUATIONAL  
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**Envelope 2**

**EXERCISE II- MARKETING**

*Bookkeeper-GSI has an immediate opening for a qualified individual with general ledger, accounts payable, receivable and posting experience. Apply in confidence- Principals only, please. Call: (evaluation ph #)*

Your objective is to market your best candidate into a company that you know (from the above ad) has an opening for someone in the bookkeeping department. You have no other details other than the above ad. Fast Freddie's might like this candidate, but won't treat them right, so you're going to market your candidate somewhere else. The ad beckons... Using your best (or only, if such is the case) candidate, approach the company with your best attempt to generate interest or a job order (assignment). To make it easier for you to calculate, we will set your fee schedule at 1% per thousand dollars (20% at \$20,000).

You will need to identify and get to the accounting manager, as he or she would be the best person to benefit from hearing about this great candidate. If you get stuck, run out of ideas, or whatever, simply end the call by advising your Evaluator- "Let's start this one over." Hang up and recall for another fresh try. Each time you do this, your cumulative efforts will not be recognized, and you will, indeed, start from scratch, with your initial call into the Manager.

You must complete at least one call to the manager, until you get enough information as you feel constitutes a job order. This may be several calls, several attempts, but you may not leave Envelope #2 until you have your information. The job order, in its entirety must come from the Manager.

Your main objective is to get the job order, not to get an interview with the Manager for your candidate. It does little good to set interviews that simply have no value. Using the generic job order on the subsequent pages, gather as much as you can to make certain your candidate fits what the company wants. Though real job orders are far more detailed, consider your task done when you have filled in all the blanks on the ones provided. If none of your candidates fit, feel free to go back to Envelope #1 and keep fishing. You can obtain referrals from old contacts, just don't forget to tell them why...



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**JOB ORDER FORMS-CASE©**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Position Title: \_\_\_\_\_

Experience (years): \_\_\_\_\_ Duties: \_\_\_\_\_

Salary: Least: \_\_\_\_\_ Most: \_\_\_\_\_ When Needed: \_\_\_\_\_

Why Open: \_\_\_\_\_

How Long Open: \_\_\_\_\_ Steps Taken To Fill: \_\_\_\_\_

Results: \_\_\_\_\_

Fee Quoted: \_\_\_\_\_ \$\$ \_\_\_\_\_

Comments: \_\_\_\_\_

**JOB ORDER FORMS-CASE©**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Position Title: \_\_\_\_\_

Experience (years): \_\_\_\_\_ Duties: \_\_\_\_\_

Salary: Least: \_\_\_\_\_ Most: \_\_\_\_\_ When Needed: \_\_\_\_\_

Why Open: \_\_\_\_\_

How Long Open: \_\_\_\_\_ Steps Taken To Fill: \_\_\_\_\_

Results: \_\_\_\_\_

Fee Quoted: \_\_\_\_\_ \$\$ \_\_\_\_\_

Comments: \_\_\_\_\_



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**CONSULTANT ACTIVE SITUATIONAL  
EVALUATION (CASE© )**

**Envelope 3  
EXERCISE III- MATCHING**

Having opened this envelope, you feel confident that you have in hand a job order, and apparently, someone in mind who may fit it. We shall now center on the matching stage, which means you must interest the candidate in the new job order and then (if not already done!) the company in the candidate. Perhaps, in the taking of the job order, you may have already elicited interest to the point that the manager has told you he or she wants to see this person. If so, go with the flow, and play out the scenario as you have been told. It will help if you take the time to review the important parts of both parties wants and offers.

Use the forms attached to make certain your ducks are in a row in order to sell either party as needed on the next page.

Candidate OFFERS:

Title: \_\_\_\_\_  
 Experience: \_\_\_\_\_  
 Education: \_\_\_\_\_  
 Responsibilities: \_\_\_\_\_  
 Salary: \_\_\_\_\_

WANTS (Values?):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



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**What about the Client side?**

Seeks Title: \_\_\_\_\_

Experience: \_\_\_\_\_

Education: \_\_\_\_\_

Responsibilities: \_\_\_\_\_

Salary: \_\_\_\_\_

WANTS (Values):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If you finish this module, or when your Evaluator tells you, your calling period will be nearly over, except for the final interview call so that your Evaluator can find out more about you. Please be sure to make this last call in a timely manner! Then, turn in your materials to the Administrator of the CASE Studies© and good luck! - GWT