

# Hiring, Training, and Retaining Successful Design Consultants

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# Hiring, Training, and Retaining Successful Design Consultants

## 1. Hire Right.

First, hire people whose abilities and motivation fit the job.

## 2. Train Right.

Second, train them in your operation so they have the knowledge and skills to perform successfully.

## 3. Manage Right.

Third, retain your good people by providing a sense of purpose for their work, manage them professionally, and compensate them well.

# 1. HIRE RIGHT

## A. DEFINE THE JOB DESIGN CONSULTANT

### 1. PURPOSE

The purpose of a design consultant is to sell and design customized storage solutions to our clients through in-home consultations; manage leads, and provide customer service in a persuasive and friendly manner.

# 1. HIRE RIGHT

## A. DEFINE THE JOB DESIGN CONSULTANT

### 2. KEY ACTIVITIES & RESULTS

- A. Sales
- B. Design
- C. Customer Service

# 1. HIRE RIGHT

## 2. KEY ACTIVITIES & RESULTS

### A. Sales

1. Reach sales goals through company generated leads, referrals, and existing clients
2. Develop, present, and sell design packages to potential customers
3. Increase sales by achieving results in monthly sales quotas
4. Consistently maintain and increase closing rates and average sales

# 1. HIRE RIGHT

## 2. KEY ACTIVITIES & RESULTS

### B. Design

1. Create innovative and detailed designs using CAD software
2. Apply exceptional product and organizational knowledge to designs and fluently communicate this information to production, installation, and to clients
3. Produce accurate measurements & feasible designs
4. Work independently and mobile with exceptional organizational skills

# 1. HIRE RIGHT

## 2. KEY ACTIVITIES & RESULTS

### C. Customer Service

1. Coordinate management of customer account records for the entire sales cycle: the initial consultation, design process, production, and installation to ensure client satisfaction.
2. Deliver positive and swift action on client inquiries and concerns.
3. Problem solve design, installation, and production challenges and communicate solutions clearly.

# 1. HIRE RIGHT

## B. CHARACTERISTICS

- Enjoys people
- High physical energy
- Clean appearance



# 1. HIRE RIGHT

## C. EXPERIENCE

- Some design experience
- Sales experience
- Technological Aptitude
- Consistency in employment record

# 1. HIRE RIGHT

## D. BEHAVIORS

- Create Job Model of Desired Behavior
  - Outgoing
  - Persuasive
  - Sociable
- Survey & Match applicants to this Job Model.

# 1. HIRE RIGHT

## D. BEHAVIORS

(How People Usually Act)

Research:

I conducted a research project with design consultants from 2012 through 2014 by our firm. Here is the data on that project:

- 17 design consultants were surveyed

# CRITERIA

Selection as high performers:

1. High Volume – Sold over \$650,000 annually
2. Experience – A minimum of 2 years as a design consultant
3. High Performers – Owner considered them high performers.

# RESULTS

- 14 of the 17 High Performers (82%) fit a pattern of behaviors that were identifiable in a survey called a ProScan®.
- 3 of the high performers (18%) had similar patterns of behavior that were different than the 14 designers.
- High Performers can be identified using behavioral survey
- Not all designers who are successful will fit the pattern

# PROSCAN® BEHAVIORS

BEHAVIOR	DESCRIPTION	SCALE							
DOMINANCE	Take Charge/Control	+ Needs Control	OR	- Rather be Supportive					
EXTROVERSION	People	+ Enjoys People	OR	- Enjoys Private Time					
PACE/PATIENCE	Pace / Patience	+ Prefers Process	OR	- Prefers to Act Quickly					
CONFORMITY	Systems	+ Enjoys Structure & Rules	OR	- Prefers Less Structure & No Rules					
LOGIC	Decision Making	+ Gather Facts Before Making a Decision	OR	- Quick Decisions					
ENERGY STYLE	Tasks/Procedures	Thrust	Allegiance	Stenacity					
ENERGY LEVEL	Mental, Physical, and Emotional	Levels 1 through 7	1	2	3	4	5	6	7

# PROSCAN BEHAVIORS EXHIBITED BY 82% OF THE HIGH PERFORMANCE DESIGN CONSULTANTS

BEHAVIOR	DESCRIPTION	SCALE							
DOMINANCE	Take Charge/Control	+ Needs Control	OR						- Rather be Supportive
EXTROVERSION	People	+ Enjoys People	OR						- Enjoys Private Time
PACE/PATIENCE	Pace / Patience	+ Prefers Process	OR						- Prefers to Act Quickly
CONFORMITY	Systems	+ Enjoys Structure & Rules	OR						- Prefers Less Structure & No Rules
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ENERGY STYLE	Tasks/Procedures	Thrust	Allegiance			Stenacity			
ENERGY LEVEL	Mental, Physical, and Emotional	Levels 1 through 7	1	2	3	4	5	6	7

# JOB MODEL FOR DESIGN CONSULTANT

Dominance Take Charge Trait		Extroversion People Trait		Pace Patience Trait		Conformity Systems Trait		Logic – Basis for Decision Making Fact – Analytical		Energy Style		Kinetic Energy Level	
Intimidating Bold Forceful Abrasive Commanding Fearless Daring Demanding	Overwhelming Flamboyant Promoter Convincing Gregarious Pleaser Effusive	Resist change Unhurried Determined Tenacious Deliberate Persistent Avoid conflict Resilient	Judgmental Perfectionistic Uncompromising Exacting Meticulous Vigilant Strict Orthodox	Rely on established theory		Ultra Force Zone (7) An awesome energy force - can conquer almost any goal or task - have mental/physical power for sustained, complex endeavors							
Authoritative Courageous Direct Visionary Inventive Venturous Quick-witted Analytical	Eager Inspirational Expressive Empathetic Trusting Exciting Inclusive Motivating	Sympathetic Sensitive Warm Harmonious Enduring Steady Consistent Thorough	Systematic Precise Prudent Diligent Conscientious Dedicated Disciplined Conventional	Need factual proof		High Achiever Zone (6) Endless resource of energy - require extensive projects or diverse activities to channel this major force							
Firm Competitive Decisive Definite Assertive Self-assured Innovative Originator	Articulate Optimistic Sociable Responsive Fun-loving Enthusiastic Persuasive Verbal	Constant Dependable Rhythmic Methodical Informal Casual Goal-oriented Cooperative	Specialist Procedural Focused Dutiful Loyal Committed Detailed Accurate	Seek uniform fact-finding procedures		Achiever Zone (5) Significant capacity of energy for accomplishing tasks - achieve goals with high success - need extra activities to utilize energy							
Certain Confident Curious Optimistic	Participative Poised Friendly	Easy-going Amiable Pleasant	Structured Careful Orderly	Examine empirical evidence		Productive Zone (4) Ample energy to complete more than required tasks and expected goals - complete tasks productively - accommodate additional activities							
<b>Dynamism</b> Moderate Supportive Amenable	<b>Flexible / Adaptable</b> Sincere Congenial Genuine	<b>Flexible / Adaptable</b> Adjustability Like change Versatile	<b>Flexible / Adaptable</b> Open-minded Generalist Less-detailed	Validate inner sense <b>BAL</b>		Effectiveness Zone (3) Sufficient energy to meet requirements of today's jobs - focus on tasks - avoid overload							
Collaborative Agreeable Modest Accepting Attentive Helpful Discreet Tolerant	Composed Contemplative Considerate Observant Imaginative Private Selective communicator	Active Spurred Resilient Impatient Mobile Cyclical seek change Lively	Big picture Independent Avoid detail Free-spirited Flexible Creative Unconventional Individualistic	Use innate intuition and recognition		Motive Evaluation Zone (2) Capacity to complete tasks that are motive-driven - evaluate goals and focus accordingly - make every move count							
Non-competitive Cautious Peaceable Gracious Accommodating Gentle Humble Temperate	Self-protective Mild-mannered Respectful Thinker Reflective Unpretentious Quiet Introspective	Swift Driving Pressing Hasty Spontaneous Instantaneous Fast-paced Impulsive	Adventurous Free-thinker Unconstrained Challenge rules Carefree Autonomous Uninhibited Self-governing	Respond instinctively		Critically Directed Zone (1) Limited capacity, allocate efforts in order to succeed - identify priority(s) in life - direct efforts toward specific task							
Undemanding Deferring Non-controlling Tentative Hesitant Placid Yielding Complacent	Reserved Shy Circumspect Skeptical Confidential Guarded Undermonstrative Solitary	Impetuous Impelling Abrupt Coiled-spring Sporadic Short-fused Volatile Explosive	Non-detailed Free-wheeling Resistant Controversial Contrary Anti-bureaucratic Adversarial Nonconforming	Rely on initial viewpoint									
<b>Supportive</b>		<b>Reserved</b>		<b>Urgent</b>		<b>Independent</b>		<b>Feeling - Intuition</b>		<b>T</b>		<b>K</b>	

Thrust - Rocket launch style with huge energy output  
inner-directed, self-starting drive

Alliance - Follow through; supportive style;  
dedicated to completing predetermined project

Sto-Nasty - Steadfast, tenacious; locomotive-like force  
that self-initiates, pursues and completes project



# INDIVIDUAL PROSCAN FOR DESIGN CONSULTANT

Dominance Take Charge Trait	Extroversion People Trait	Pace Patience Trait	Conformity Systems Trait	Logic – Basis for Decision Making Fact – Analytical	Energy Style	Kinetic Energy Level
Intimidating Bold Forceful Abrasive Commanding Fearless Daring Demanding	Overwhelming Unhurried Verbose Promoter Convincing Gregarious Pleaser Effusive	Resist change Unhurried Determined Tenacious Deliberate Persistent Avoid conflict Resilient	Judgmental Perfectionistic Uncompromising Exacting Meticulous Vigilant Strict Orthodox	Rely on established theory	<p>Primary Step</p> <p>Thrust - Rocket launch style with huge energy output inner-directed, self-starting drive</p> <p>Allegiance - Follow through, supportive style; dedicated to completing predetermined project</p> <p>Sto-Nacity - Steadfast, tenacious; locomotive-like force that self-initiates, pursues and completes project</p>	Ultra Force Zone (7) An awesome energy force - can conquer almost any goal or task - have mental/physical power for sustained, complex endeavors
Authoritative Courageous Direct Visionary Inventive Venturous Quick-witted Analytical	Eager Inspirational Expressive Empathetic Trusting Exciting Inclusive Motivating	Sympathetic Sensitive Warm Harmonious Enduring Steady Consistent Thorough	Systematic Precise Prudent Diligent Conscientious Dedicated Disciplined Conventional	Need factual proof		High Achiever Zone (6) - Endless resource of energy - require extensive projects or diverse activities to channel this major force
Firm Competitive Decisive Definite Assertive Self-assured Innovative Originator	Articulate Optimistic Social Responsive Fun-loving Enthusiastic Persistent Verbal	Constant Dependable Rhythmic Methodical Informal Casual Good-natured Cooperative	Specialist Procedural Focused Dutiful Loyal Committed Detailed Accurate	Seek uniform fact- finding procedures		Achiever Zone (5) Significant capacity of energy for accomplishing tasks - achieve goals with high success - need extra activities to utilize energy
Certain Confident Curious	Participative Poised Friendly	Easy-going Amiable Pleasant	Structured Careful Orderly	Examine empirical evidence		Productive Zone (4) Ample energy to complete more than required tasks and expected goals - complete tasks productively - accommodate additional activities
Moderate Supportive Amenable	Sincere Congenial Genuine	Adjustability Like change Versatile	Open-minded Generous Less-detailed	Validate inner sense		Effectiveness Zone (3) Sufficient energy to meet requirements of today's jobs - focus on tasks - avoid overload
Collaborative Agreeable Modest Accommodating Attentive Helpful Discreet Tolerant	Composed Contemplative Considerate Observant Imaginative Private Selective communicator	Active Spirited Resilient Impetuous Mobile Dynamic Seek change Lively	Big-picture Independent Avoid detail Free-spirited Flexible Creative Unconventional Individualistic	Use inner <b>FEEL</b> and recognition		Motive Evaluation Zone (2) Capacity to complete tasks that are motive-driven - evaluate goals and focus according - make every move count
Non-competitive Cautious Peaceable Gracious Accommodating Gentle Humble Temperate	Self-protective Mild-mannered Respectful Thinker Reflective Unpretentious Quiet Introspective	Swift Driving Pressing Hasty Spontaneous Instantaneous Fast-paced Impulsive	Adventurous Free-thinker Unconstrained Challenge rules Carefree Autonomous Uninhibited Self-governing	Respond instinctively		Critically Directed Zone (1) Limited capacity, allocate efforts in order to succeed - identify priority(s) in life - direct efforts toward specific task
Understanding Deferring Non-controlling Tentative Hesitant Placid Yielding Complacent	Reserved Shy Circumspect Confidential Guarded Undernourished Solitary	Impetuous Impelling Abrupt Coiled-spring Sporadic Short-fused Volatile Explosive	Non-detailed Free-wheeling Resistant Controversial Contrary Anti-bureaucratic Adversarial Nonconforming	Rely on initial viewpoint		
Supportive	Reserved	Urgent	Independent	Feeling - Intuition		T A S K

# JOB MATCH OF CANDIDATE TO JOB MODEL: 80% MATCH

Dominance Take Charge Trait	Extroversion People Trait	Pace Patience Trait	Conformity Systems Trait	Logic – Basis for Decision Making Fact – Analytical	Energy Style	Kinetic Energy Level	
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<b>DYNAMIC</b> Moderate Supportive Amiable	<b>ADAPTABLE</b> Sincere Congenial Genuine	<b>ADAPTABLE</b> Adjustability Resist change Versatile	<b>ADAPTABLE</b> Open-minded Genuine Less-detailed	Validate inner sense		Effectiveness Zone (3) Sufficient energy to meet requirements of today's jobs - focus on tasks - avoid overload	
Collaborative Agreeable Modest Accepting Attentive Helpful Discreet Tolerant	Composed Contemplative Considerate Observant Imaginative Private Selective Communicator	Active Spontaneous Resilient Impatient Mobile Dynamic Seek change Lively	Big picture Independent Avers detail Free-spirited Flexible Creative Unconventional Individualistic	Use inner logic and recognition		Motive Evaluation Zone (2) Capacity to complete tasks that are motive-driven - evaluate goals and focus accordingly - make every move count	
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<b>Supportive</b>	<b>Reserved</b>	<b>Urgent</b>	<b>Independent</b>	<b>Feeling - Intuition</b>		<b>T</b>	<b>K</b>

Thrust - Rocket-launch style with huge energy output  
Inner-directed, self-starting drive

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Steadfast - Steadfast, tenacious; locomotive-like force  
that self-initiates, pursues and completes project

# 1. HIRE RIGHT

## E. RECRUITING

### 1. INTERNAL

- Incentives for employee referrals?
- Are the incentives adequate?

### 2. EXTERNAL

- Use words that relate to the behaviors you want in that job.

Example: Want sales people? Include adjectives:

- Doer and Driver
  - Results Oriented
  - Self Starter
- Use Indeed.com, now #1 in the world.

# 1. HIRE RIGHT

## F. INTERVIEWING & SELECTION

### WHAT IS THE INTERVIEWING PROCESS?

- Use two or more people to interview.
- Use targeted behavior questions because past behavior is best predictor of future behavior.

Example: “Give me an example from your past experience of a difficult customer you tried to sell and how you handled it.”

- Behavioral surveys like a ProScan
- Drug test
- Background checks
- Always check references.

## 2. TRAIN RIGHT

### A. BASIC TRAINING FOR NEW DESIGN CONSULTANT

- Shadow Interview
- Job Shadow first 2 weeks
- Coach and Train on Appointments
- Early Performance Tracking

### B. TRAINING MANUAL

- Whatever you want a designer to do correctly needs to be in writing

### C. MAXIMUM FEEDBACK EARLY ON

- The earlier you confront a resistance to perform within a system, the faster you get to where you are going: successful performance or termination.

# 3. MANAGE RIGHT

## RETAINING SUCCESSFUL DESIGN CONSULTANTS

- A. Coaching for Improvement
  - Appointments
  - Designs & Plans
- B. Goal Setting
  - Clear Expectations
  - Support Reaching Goals
- C. Accountability
  - Document
  - Present Early On
  - Design Errors & Mistakes

# HIRE RIGHT. TRAIN RIGHT. MANAGE RIGHT

## 1. HIRE RIGHT

- Match the Person to the Job

## 2. TRAIN RIGHT

- Provide the tools and training to be successful

## 3. MANAGE RIGHT

- Use the Platinum Rule when managing

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