

When you hire a new preneed counselor, do you feel fairly confident the person will work out, or do you consider each new hire a roll of the dice? There's no way to guarantee that every hire will be "golden," but you can turn the odds in your favor by making use of research on the relationship of personality to sales success.

# Personality Type and The Preneed Counselor

by Michael Gravelle

*The preneed counselor does far more than acquire customers. He is your total reputation—your image in the marketplace.*

—Frank B. Stewart Jr.,  
Chairman Emeritus,  
Stewart Enterprises

We are all aware of the tremendous impact the right preneed counselor can have on our organizations and the potential damage the wrong one can inflict. A good counselor can develop clients and referrals your company will benefit from for years, whereas a bad one can ruin a reputation that took decades to build.

That said, most managers are less scientific about hiring counselors than they are about buying a piece of office equipment. They replace rigorous, quantifiable analysis and reference-checking with general impressions and gut feel.

Meanwhile, today's candidates are better trained than ever. They've had plenty of practice in interviews and they can download the latest résumé templates from the Web. Monster.com even offers sales-specific virtual interviews for multiple industries, though I have not seen any for the death-care industry—yet.

In this article, I will provide insight and in-depth analysis into something that will ultimately lead to the success or failure of your potential preneed counselor—personality.

## Hiring A Preneed Counselor: A Unique Challenge?

There are several factors that make recruiting of preneed counselors a special challenge. The first is that the cemetery and funeral service profession tends to attract compassionate individuals motivated to comfort others in their hour of need.

Our research across many industries tells us that top sales people, on the other hand, tend to be more egotistical and self-focused.

This creates a personality dilemma. Those of you who have tried to convert your at-need counselors to preneed know what I am talking about.

The second factor is that funeral service relies heavily on performance-based pay. This tends to scare away people who feel entitled to a paycheck every week—which is not necessarily a bad thing, but it does limit your pool of qualified applicants.

The third factor is that there will be a portion of qualified candidates who feel reluctant to join the funeral service profession because it deals with death and they are not comfortable with that. Once again, the applicant pool shrinks.

The last two factors combined can lead to the typical job interview becoming more of a sales pitch than an assessment of the candidate. The time spent "selling" the candidate gets borrowed from time that should be spent assessing the candidate. As a result we tend to overlook subtle, or not-so-subtle, red flags that pop up during the interview process.



Michael Gravelle

## Turnover: The Nature of the Beast?

In many industries, managers seem resigned to the fact that high turnover is unavoidable. In call centers, I've had managers tell me, "It's the nature of the industry—these are low-paying, stressful jobs." During the high-tech boom I had managers tell me "It's the nature of the industry—these are high-paying jobs." In commissioned sales positions, managers often have a "sink or swim" philosophy. Hire enough sales people and some of them are bound to work out, and if they don't, it's no great loss since we're not paying them anyway—right?

Wrong. The cost of turnover has many hidden components that don't show up as line items on income statements, but impact the bottom line nonetheless. One industry trainer confided that, in his company, new recruits go through a four-to-six-week training period and that many drop out prior to completing the training. There is no ROI on reps who do not make it through the ramp-up period.

Sales managers in high-turnover industries often feel like full-time recruiters. I once asked the sales manager of a multi-location funeral home in the Midwest how much more revenue he could generate if he cut in half the amount of time he spent recruiting and interviewing candidates and instead spent it on the road making presentations with his team. After some thought, he came to the conclusion that so far that year, they could have generated an extra \$200,000—and it was only May!

While we will never rid ourselves com-

Very high sociability in relationship to dominance can lead to the “professional visitor” syndrome. You may have seen this before—the counselor does a great job building relationships with prospects and can converse with them easily on a wide variety of topics. But they fear doing anything that will jeopardize the relationship with their new friend, such as closing the sale.

pletely of turnover, even a small improvement can affect your bottom line. Replacing a single low performer with a high performer will have significant impact on your business.

**Personality of the ‘Ideal’ Preneed Counselor**

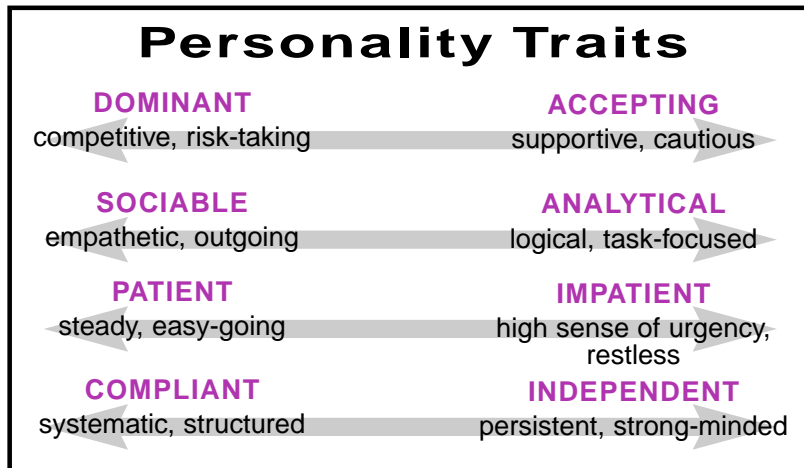
It has long been recognized that personality type has significant impact on an individual’s ability to sell successfully. And yes, though some don’t like to admit it, a preneed counselor *is* a salesperson.

Going back to the 1950s, insurance companies started measuring the personalities or “behavioral profiles” of salespeople using psychometric instruments. At the time, insurance industry managers often cited “previous sales experience” or “connections” as key success factors, yet studies of their high performers indicated that these qualities had little impact. There was a far stronger correlation between sales success and underlying behavioral traits. These traits are established fairly early in our lives and we either have them or we don’t. Psychological research pointed to four factor models, such as the one in the chart on this page.

So where does the “ideal” preneed counselor’s personality fit on this chart?

Research tells us that you’d like your preneed counselors to be dominant but not quite as dominant as, say, a photocopier salesperson. A sales director for an office equipment distributor once boasted that his success was based on the fact that he hired “the most aggressive sales force in the industry.” This may not work in a profession where companies spend years developing a compassionate, sensitive image in their communities.

The photocopier salesperson and many salespeople involved in business-to-business selling do not necessarily need to be *sociable*. This can often surprise many who believe that “the gift of gab” may be critical to wooing customers. Sociability can be an



asset if correctly leveraged, but at the same time, being too sociable may work against sales reps in roles that require a great deal of telephone prospecting and dealing with rejection. *Analytical* types can effectively organize their day, eliminate time-wasters and focus on activities that will lead to success.

Top preneed counselors, on the other hand, tend to be more *sociable*. They need to quickly build a trusting relationship and demonstrate extreme empathy when trying to get their prospects to come to terms with what Frank B. Stewart Jr. refers to as the “reality of their own mortality.”

Be careful though—very high *sociability* in relationship to *dominance* can lead to the “professional visitor” syndrome. You may have seen this before—the counselor does a great job building relationships with prospects and can converse with them easily on a wide variety of topics. But they fear doing anything that will jeopardize the relationship with their new friend, such as closing the sale.

For the most part, *patience* is not a virtue in sales, unless maybe you sell 747s or nuclear reactors. Most prospective customers view their death as something far in the future and don’t feel the burning desire to act immediately. If they don’t get a nudge from the counselor, it is unlikely that they will move to make preneed arrangements. Therefore, the top preneed counselors tend to be more *impatient*. They personally feel

pressure to make the sale and they exert some of that pressure, very tactfully, on the prospect.

*Compliance* is trait that your office staff would like your salespeople to have. They’d like them to be organized, follow company policy, not oversell and get their paperwork right. But the fact of the matter is that though you sometimes get the dream salesperson who sells and plays by the rules, most top salespeople are

*independent* entrepreneurs who don’t like to be too closely controlled. As one sales manager lamented over a highly compliant salesperson, “He gets all of his paperwork right—that’s because he never has very much of it!”

A high degree of *compliance* is usually indicative of a need for structure and security, something that most commissioned sales roles don’t provide.

So then, the classic preneed counselor demonstrates a combination of *dominance, sociability, impatience* and *independence*. But what about that gentle at-need counselor who you think would be dynamite in a pre-need role? Couldn’t he just flex his behaviors on sales calls, behave more assertively and create pressure to close the sale?

Of course this is always possible, but our research indicates that while many people can do this in the short term, it will be difficult to maintain day after day. We all have our comfort zones, and if asked to behave outside of that zone on a daily basis, getting up for work every morning becomes a chore.

But don’t people without those traits succeed in preneed roles? Of course they do, but far less frequently than those with the right trait combination. Hiring is a gamble and personality profiling is a way to help you increase your odds.

But what about people who must fill both preneed *and* at-need roles? Though I have often had owners tell me they have people

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who are great at both, after closer analysis we often find that they tend to excel at one and be just OK at the other.

To get the maximum benefit from personality profiling, it needs to be combined with an interview process that probes for examples of past behaviors related to the traits measured. A sales director once told me about a candidate who had really impressed him as well as his sales manager. She was enthusiastic, had great presence and seemed really excited about working in the industry. To everyone's disappointment, an assessment of her personality revealed that she was low on dominance and high on compliance.

"Although she claimed to view performance-based pay as a challenge she was looking forward to, the assessment said she was not a risk-taker and security was a key motivator," the sales director explained. "We don't rule out candidates entirely because of the personality test results, so we prepared a list of questions that probed her past for times when she had behaved like an entrepreneur. We were hoping there were times when she might have put everything on the line to win, or persisted against a lot of resistance, or influenced others in a difficult situation, but we came up empty. In the end, we saved both ourselves and herself from disappointment."

Of course, just because a person has the

right underlying personality for the job does not guarantee success in the role. I always remember a conversation I had many years ago with Bernie LePage of The Christian Memorial Cultural Center in Rochester Hills, Michigan. "We were hiring someone for the position of sales manager and this gentleman had a great profile—aggressive, pushing for results and a risk-taker. During the background check we confirmed this—he had spent time in jail for robbing a bank!"

#### **Personality in Action: The Role-Play**

Reference and background checking is one way of getting a look at an individual's personality in action. Another great tool is the role-play.

In the role-play we observe how the candidate leverages his or her personality traits to make the sale. We can assess qualities like intelligence, tact, passion and critical thinking. Here's how it works:

In the first interview, explain the sales process to the candidate, provide an outline of the typical presentation and any brochures that you may have. Inform the candidate that in the second interview you would like her to make an in-home presentation. Make it as realistic as possible. Have a man and woman play the husband and wife team and offer up common objections. You will catch a glimpse of the candidate's future potential—

how quick she is on her feet, how she develops rapport and how well she has prepared for the presentation.

The same thing can also be done for over-the-phone prospecting if that seems to be a stumbling block for new counselors.

Some sales managers do not like putting candidates through a rigorous hiring process that includes role-playing and personality testing. They fear they might scare away candidates in the process. But remember that it is far less costly to have them drop out during the hiring process than after you have invested countless hours in their training.

As Coleman Mockler, former CEO of Gillette once said, "Every minute devoted to putting the proper person in the proper slot is worth weeks of time later."

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*Michael Gravelle is vice president of The McQuaig Institute, [www.mcquaig.com](http://www.mcquaig.com), an international organization committed to helping companies assess, select and develop the most productive people. He has worked with a number of independent funeral homes as well as larger organizations, including Stewart Enterprises and Service Corporation International. He can be reached at [mgravelle@mcquaig.com](mailto:mgravelle@mcquaig.com) or 1-800-387-5455, ext. 361.*