

Final Report: Client Recommendations

Assessment Team: Stephanie Roller, Nicole Manley, and Casie McClellan

Section 1: Client Description

Personality Pool is a personality screening tool designed for employers to implement. They have the desire to make sure employers are hiring the right candidates for the job, by pairing the right job and the right personality. They are achieving this by asking 3-5 video questions, pertaining to the job opening, that are available to review after the candidate has completed them. They are currently working with companies in sales roles and retail. Personality Pool is currently expanding into healthcare, child care, and elder care, but would like to move into hospitality, trades, and corporate. The focus is entry-level careers where personality may outweigh experience or education.

Personality Pool is looking to extend their client database and reach into new markets. The current marketing strategies are limited to cold calls and emails. Our objectives are to look at the effectiveness of current marketing strategies and see where other options could be implemented for the desired growth. These other options can involve looking at effectiveness in current markets, tailoring marketing to specific markets, and reviewing collected data.

Section 2: Objectives

- Collect opinions from Personality Pool employees on potential for company growth.
- Identify potential organizational issues that might serve as an obstacle for company growth.
- Examine cold calls/email scripts and any research behind creating them.
- Discuss rationale for current marketing strategy.
- Determine if current clientele are the “ideal” clients for Personality Pool.
- Examine client response rates of current marketing techniques.
- Evaluate the satisfaction levels of current clientele (retention rates of employees, hiring rate, hiring rate, etc.).
- Compare differences of satisfaction levels between different sectors (retail, healthcare, etc.).

- Assess possibilities for new client bases.
- Explore alternative marketing strategies, like advertising and enhanced social media presence.

Section 3: Data Collection Procedures and Rationale

We conducted multiple surveys for our data collection, one which focused on the team doing the cold calling/emailing and one for existing clients. We were unable to collect data from the potential clients.

Our rationale for the survey focusing on the cold calling/emailing team is that this is a main way that our client obtains new business. We wanted to determine the comfort level the employees have with cold calling and sending emails to potential clients from those lists. A survey provides us with a direct way to gather information on the employees feelings, needs, and suggestions. The survey questions allowed for employees to openly answer questions on their comfort level conducting the task, but also to share their feelings toward any training and any suggestions they may have to better improve their current training.

Originally, we desired to conduct an interview with the current clients so that we could gain a better understanding of their reasoning for choosing Personality Pool. Unfortunately, we were unable to conduct these interviews and there was a mix-up where the Post-Call/Post-Email Survey was given to the current clients. Our rationale behind the interview was to gain a better understanding of current clients' outlooks, but also to understand how Personality Pool has affected their hiring process and quality of new hires.

Originally, we wanted to conduct surveys with potential clients and this was approved by the CEO of Personality Pool. We wanted to gain a better insight of why they may or may not choose Personality Pool for their hiring needs. However, the CEO chose later to not use this survey on potential clients as to not disrupt sales processes. Because of this, we were not able to obtain any data that would help guide us in why or why not clients are choosing Personality Pool, but it could be an interesting avenue to explore in the future.

Section 4: Results

Assessment Tool 1: Post-Call/Post-Email Survey (A.K.A. Post-Introductory Survey)

We conducted a 24-question survey for Personality Pool to send out to clients they either cold called or sent a cold email to. The survey was intended to be sent to clients who did not end up going with the company. We wanted to determine any trends or patterns in why these potential clients decided against using the company’s services. The intent was to use this data to improve the efficacy of this client recruitment tool. While the CEO decided to send the survey to current clients of the company instead of potential clients to not interfere with the sales processes, we still discovered some interesting data.

Post-Call/Post-Email Survey							
Section #1: Background Information							
	They cold called me	They cold emailed me	I found them on the Internet	I heard from them from word of mouth	Other (please specify)		Number of Responses
	1	2	3	4	5		
How did you first hear about Personality Pool?				2	1- Worked with SVC		3
					Mean: 4.33	Median: 4	Mode: 4

	Strong preference for hard skills	Slight preference for hard skills	Equal preference for hard skills and soft skills	Slight preference for soft skills	Strong preference for soft skills	No preference	Number of Responses
	1	2	3	4	5		
For applicants applying to entry level positions, do you have more of a preference for their technical hard skills or personal soft skills?			1		2		3
					Mean: 4.33	Median: 5	Mode: 5

	Yes	No					Number of Responses
	1	2					
Does your organization have entry level positions, such as those that rely more on soft personal skills than hard technical skills, that need to be filled?	3						3
					Mean: 1	Median: 1	Mode: 1

	Yes	No					Number of Responses
	1	2					
If you answered yes to the last question, are you currently hiring or have recently (within the last six months) hired for these positions?	3						3
					Mean: 1	Median: 1	Mode: 1

	Very satisfactory	Satisfactory	Neutral	Unsatisfactory	Very unsatisfactory		Number of Responses
	1	2	3	4	5		
If you answered yes to the last question, how would you rate the quality of your entry-level applicant pool?		1	1	1			3
					Mean: 3	Median: 3	Mode: No Mode

	Very satisfactory	Satisfactory	Neutral	Unsatisfactory	Very unsatisfactory		Number of Responses
	1	2	3	4	5		

Was your first communication from Personality Pool done through a phone call, email, or other medium?			2- In-Person 1- Investor who uses the product				3
					Mean: 3	Median: 3	Mode: 3

	Very Open	Slightly Open	Not Open				Number of Responses
	1	2	3				
If you were cold called or cold emailed, how open were you to engaging with this representative?	3						3
					Mean: 1	Median: 1	Mode: 1

	Very professional	Slightly professional	Not professional or unprofessional	Slightly unprofessional	Very unprofessional		Number of Responses
	1	2	3	4	5		
If you did engage with the Personality Pool representative, how professional was your conversation with them?	1						1
					Mean: 1	Median: 1	Mode: 1

	Very thoroughly	Slightly thoroughly	Not thoroughly				Number of Responses
	1	2	3				
How thoroughly did this representative explain Personality Pool's services to you?	2						2
					Mean: 1	Median: 1	Mode: 1

	Very Satisfied	Slightly Satisfied	Neutral	Slightly Unsatisfied	Very Unsatisfied		Number of Responses
	1	2	3	4	5		

How satisfied were you after your initial conversation with this Personality Pool representative?	2						2
					Mean: 1	Median: 1	Mode: 1

Section #3: Next Steps							
	Ask for more information from a Personality Pool representative	Request to sign up for Personality Pool's services	Decline to pursue any further communication with Personality Pool	Other (please specify)			Number of Responses
	1	2	3	4			
After your communication with Personality Pool, what are your next steps?		2					2
					Mean: 2	Median: 2	Mode: 2

Client: Cold Call/Cold Email				
Section #1: Background Information				
	Response #1	Response #2		Number of Responses
What services does your organization provide?	Recruitment	Retail and Wholesale		2

	Response Summary	Number of Responses
Could you explain your reasoning for how you rated the quality of your entry-level applicant pool?	Hard to find enough applicants and/or determine their qualifications. Impressed with the screening ability of Personality Pool. Some clients were unsatisfied with Personality Pool's lack of professional etiquette and advancement of candidates to second look.	3

	Response Summary	Number of Responses
Can you expand on that? (If you are satisfied or very satisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?)	Feel that soft skills can't be trained and are a valuable selection tool. Communication, work ethic, and resourcefulness is key.	3

	Response #1	Response #2	Response #3	Number of Responses
Can you expand on that? (If you are unsatisfied or very unsatisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?)	Happy with experience and office employee demeanor and work ethic.			1

Section #2: Call/Email Experience

	Response Summary	Number of Responses
If you were not open to engaging with this representative, what prevented you from feeling receptive to such communication?	Always open to communication and enjoyed their experience.	1

	Response Summary	Number of Responses
If you were not open to engaging with this representative, was there something the representative could have said or done that would have made you feel more open to engagement?	Responses were not provided for this question.	0

	Response Summary	Number of Responses
Was there any part of this Personality Pool representative's explanation that caused any confusion, doubt, or reluctance to engage further?	Personality Pool provided clear and concise communication and were quick to answer and resolve any client questions.	1

	Response #1	Response #2	Response #3	Number of Responses
Could you expand on your last answer? (How satisfied were you after your initial conversation with this Personality Pool representative?)	Clients felt that their meetings with Personality Pool employees were fruitful and had positive experiences			2

	Response #1	Response #2	Response #3	Number of Responses
Was there anything that you think should be changed or added to future cold calls/emails to potential clients?	Responses were not provided for this question.			0

Section #3: Next Steps

	Response #1	Response #2	Response #3	Number of Responses
If you would like to ask for more information from Personality Pool or sign up for their services, what about your communication with them has interested you in maintaining contact?	Clients felt that their communication and control over screening clients was ideal.			2

	Response #1	Response #2	Response #3	Number of Responses
If you chose to decline further communication with Personality Pool, what about your communication with them has prevented interest in maintaining contact?	Responses were not provided for this question.			0

	Response #1	Response #2	Response #3	Number of Responses
Could the representative have said or done something differently that might have changed your mind?	Responses were not provided for this question.			0

	Response #1	Response #2	Response #3	Number of Responses
If you want to use Personality Pool's services, in what ways do you think it will serve your organization?	Clients felt that Personality Pool has a lot of potential. Their business model and beliefs aligned well with Personality Pool's ability to select potential employees based on soft skills and how they fit within their workplace environment.			1

	Response #1	Response #2	Response #3	Number of Responses
If you don't want to use Personality Pool's services, in what ways do you think it will not serve your organization?	Responses were not provided for this question.			0

Assessment Tool 1 — Findings:

While we did not receive the type and amount of data we had hoped for, the three responses we did receive provided some insight. Unfortunately, the data does not directly correlate with our objectives and original, client-agreed upon plan. The received responses are not complete and several survey questions for each participant were not completed. However, we did learn helpful information.

The survey responses indicate strong support for Personality Pool's focus on soft skills in the hiring process. All respondents currently have entry-level positions open and place high value on attributes like communication, personality, and resourcefulness.

Based on the responses, all respondents tend to place more value in soft skills than technical skills. While the quality of entry-level applicants was rated as mixed, those who used Personality Pool found it helpful for pre-screening candidates and improving overall fit. Satisfaction with recent hires was high, with soft skills cited as a key reason. Initial contact with Personality Pool representatives was overwhelmingly positive, with respondents praising the professionalism, clarity, and responsiveness of the communication. This was particularly true when interactions were in-person or through trusted third parties. All respondents expressed interest in continuing or beginning to use Personality Pool's services, citing the platform's potential to improve applicant screening and align hiring decisions with organizational culture.

Perhaps most interestingly, none of the existing clients signed up for Personality Pool due to cold calls or cold emails, citing instead in-person meetings or word-of-mouth. Since this is a small sample pool, this is not necessarily suggesting that cold calls and cold emails are not effective, but it does potentially lend support to the fact that they could be more effective.

Assessment Tool 1 — Needs Analysis:

The survey reveals that clients struggle to reliably identify and evaluate soft skills in entry-level applicants, which are deemed crucial for job performance and cultural fit. This challenge contributes to a lack of confidence in applicant quality and underscores the need for a screening tool that effectively assesses personality and communication skills. This is an area that traditional resumes and interviews often fail to capture adequately. In the following list, we show what objectives were addressed by our data and needs analysis.

- **Determine if current clientele are the “ideal” clients for Personality Pool.**
 - Soft skills are a hiring priority: 2/3 of respondents prioritize soft skills over hard skills for entry-level roles.
 - Existing applicant pools lack soft-skill visibility: Comments show difficulty assessing candidates' interpersonal qualities via resumes/interviews alone.
- **Examine client response rates of current marketing techniques.**
 - All existing client responses believed that the marketing pitch they received from Personality Pool was thorough and engaging, with all their questions being answered.
- **Evaluate the satisfaction levels of current clientele (retention rates of employees, hiring rate, hiring rate, etc.).**

- Satisfaction is tied to soft skill performance: All respondents reported satisfaction strongly correlated to personality, communication, and adaptability.
- Positive experience with Personality Pool so far: All organizations reported being very open to engagement, found the communication very professional, and expressed interest in continuing with the service.

Assessment Tool 2: Employee Comfort with Cold Calling Survey

We conducted a 22-question survey for Personality Pool employees to determine their comfort level and training needs. The survey was intended to be used to determine what training needs exist for the current employees.

Survey: Employee Comfort with Cold Calling

Section #1: Background Information

	Open Answer							Number of Responses
Your role in the company?	CEO	Intern						2

	Less than 6 months	6 months - 1 year	1-3 years	3+ years				Number of Responses
	1	2	3	4				
How long have you been in your current role?	1		1					2
				Mean: 2	Median: 1	Mode: No Mode		

	Daily	Weekly	Monthly	Rarely	Never			Number of Responses
	1	2	3	4	5			
How often do you conduct phone calls to potential clients from the cold call list?	1	1						2
				Mean: 1.5	Median: 1.5	Mode: No Mode		

	Daily	Weekly	Monthly	Rarely	Never			Number of Responses
	1	2	3	4	5			
How often do you send emails to potential clients from the cold call list?	1	1						2
				Mean: 1.5	Median: 1.5	Mode: No Mode		

Section #2: Comfort Level with Cold Calling

	Very comfortable	Somewhat Comfortable	Neutral	Somewhat Uncomfortable	Very Uncomfortable			Number of Responses
--	------------------	----------------------	---------	------------------------	--------------------	--	--	---------------------

	1	2	3	4	5			
How comfortable do you feel when making cold calls to potential clients?	1	1						2
				Mean: 1.5	Median: 1.5	Mode: No Mode		

	Very Confident	Confident	Neutral	Not Confident	Not Confident at All			Number of Responses
	1	2	3	4	5			
How confident are you in your ability to effectively communicate with potential clients on cold calls?		2						2
				Mean: 2	Median: 2	Mode: 2		

	Yes, definitely	Yes, but more support would be helpful	Not Sure	No, more support is needed	No, I feel prepared			Number of Responses
	1	2	3	4	5			
Do you feel you have enough training and support to make cold calls effectively?		1	1					2
				Mean: 2.5	Median: 2.5	Mode: No Mode		

Section #3: Comfort Level with Emailing Cold Call Clients

	Very comfortable	Somewhat Comfortable	Neutral	Somewhat Uncomfortable	Very Uncomfortable			Number of Responses
	1	2	3	4	5			
How comfortable do you feel emailing potential clients from a cold call list?	2							2
				Mean: 1	Median: 1	Mode: 1		

	Fear of coming across too pushy	Uncertainty about the content or tone	Concern about legal or compliance issues	Not knowing enough about the	Lack of response from potential clients	Other (please specify):		Number of Responses
--	---------------------------------	---------------------------------------	--	------------------------------	---	-------------------------	--	---------------------

	change s.	for each client.	client's profile.	and often feel uncertain.				
	1	2	3	4				
Which of the following best describes your approach to writing cold emails?		2						2
					Mean: 2	Median: 2	Mode: No Mode	

	Yes	No	Not Sure					Number of Responses
	1	2	3					
Do you feel that the company's cold calling email templates are effective in initiating conversations with potential clients?	1	1						2
					Mean: 1.5	Median: 1.5	Mode: No Mode	

Section #6: Support and Improvement

	More training on communication techniques	Scripts or templates for calls	Role-playing sessions	More detailed client background information	Regular feedback from managers	Access to a mentor or coach	Other (please specify):	Number of Responses
	1	2	3	4	5	6		
What kind of support or resources would help you feel more comfortable with cold calling? (Select all that apply)				1	1			2
					Mean:	Median:	Mode:	

	More team collaboration (e.g., team calls, group	A mix of both team and individual work	More individual work (e.g., solo calls with minimal					Number of Responses
--	--	--	---	--	--	--	--	---------------------

	meeting s)		collabora tion)					
	1	2	3					
Would you prefer more team collaboration or individual work when making cold calls?	1		1					2
					Mean: 2	Median: 2	Mode: No Mode	

	Yes	No	Somewha t					Number of Responses
	1	2	3					
Do you feel that you have received sufficient training or resources on how to email potential clients?	1		1					2
					Mean: 2	Median: 2	Mode: No Mode	

	Very comfortable	Somewha t Comfortable	Neutral	Somewh at Uncomfo rtable	Very Uncomfort able			Number of Responses
	1	2	3	4	5			
How confident are you in your ability to craft an email that will engage a potential client?	1	1						2
					Mean: 1.5	Median: 1.5	Mode: No Mode	

Survey: Employee Comfort with Cold Calling			
Section #5: Email Content and Strategy			
	Response #1	Response #2	Number of Responses
What improvements, if any, do you believe could be made to the cold-emailing process or templates?	N/A	N/A	0
Section #6: Support and Improvement			
	Response #1	Response #1	Number of Responses
What do you enjoy most about cold calling?	the insights you get from potential customers	Being able to be so direct with clients and not having to beat around the bush	1

	Response #1	Response #1	Number of Responses
What challenges do you face when making cold calls, and how do you overcome them?	getting through to a decision maker	My main challenge is responding to questions. I try to adapt as best I can.	1
	Response #1	Response #1	Number of Responses
Is there anything else you would like to share about your experience with cold calling?	N/A	N/A	0
	Response #1	Response #1	Number of Responses
Do you have any additional feedback on how to improve the comfort and effectiveness of emailing potential clients?	N/A	N/A	0

Assessment Tool 2 — Findings:

Only two employees were surveyed regarding their experiences and comfort levels with cold calling and emailing potential clients, which included the CEO and an intern. The CEO, with 1–3 years in their role, engages in daily outreach, while the intern, with less than 6 months of experience, does so weekly. Both report feeling confident in making cold calls, though this ranges from “very comfortable” to only “somewhat.” The responses regarding support range from having adequate support but being able to benefit from more to uncertainty about the support received. Common discomforts include lack of client information, fear of rejection, and nervousness. Both participants feel very comfortable with email outreach and personalizing email templates, though their views differ on the effectiveness of the company’s templates; one party finds them potentially ineffective, while the other party finds them useful. One party prefers independent work and would benefit from more detailed client data, while the other favors team collaboration and manager feedback. In terms of email crafting, one party is very confident, whereas the other is only somewhat comfortable. Open-ended responses highlight that one party enjoys gaining insights from clients, while the other appreciates the direct nature of cold calling. Key challenges include reaching decision-makers for one party and handling unexpected questions for the other party.

Assessment Tool 2 — Needs Analysis:

There is a clear need for enhanced training, better resources, and more collaborative support to improve comfort and effectiveness with cold calling and email outreach. Differences in experience level between roles (CEO vs Intern) reveal varying needs, but both express gaps that point to organizational improvements. In the following list, we show how we matched our data and needs analysis to existing objectives.

- **Collect opinions from Personality Pool employees on potential for company growth.**
 - Training Gaps: Both respondents indicate a need for improved or more consistent training, particularly on cold calling techniques and email strategies.
- **Identify potential organizational issues that might serve as an obstacle for company growth.**
 - Feedback and Support: One party desires managerial feedback and team collaboration, suggesting a need for more structured mentorship or peer support.
 - Emotional Barriers: One party experiences more emotional hesitation (fear and nervousness), pointing to a need for confidence-building and skill-reinforcement exercises.
 - Mismatch in Perceived Template Effectiveness: The CEO finds templates ineffective, indicating a disconnect between senior and junior staff in resource utility.
 - Resource Deficiency: Lack of detailed client information hinders effectiveness and comfort, especially for the CEO.

Additional Resources: Cold Call Script

Lastly, we were given access to the existing cold call template, along with the plans Personality Pool had about changing their marketing structure. In the future, the cold email template should be analyzed as well.

Cold Call Script — Findings:

The template is engaging and flexible, intended to be adapted to different clients' needs. Several concrete quotations are helpful for knowing exactly how to respond to a client. However, we found that this template may be more geared towards participants who already have something of a natural intuition in how to handle these communications. For example, it mentions aspects such as connecting a client's pain points to industry struggles or transitioning to solutions, but doesn't precisely illustrate how to go about this. Since one of the survey responses mentioned struggling with adapting to different

client questions, we wonder if this training could be made more specific for those who need more guidance.

The change to the marketing plan suggested that Personality Pool wanted to move from cold calls to cold emails due to lack of good cold client responses. However, we did not gain insight into what the cold quality responses do typically look like or how the cold email responses are better in comparison.

Cold Call Script — Needs Analysis:

Here, we connect our data to existing objectives.

- **Discuss rationale for current marketing strategy.**
 - Our survey data, which suggests some uncertainty of the training and adaptability with the cold calls, explains why there is a suggested shift from cold calls to cold emails. However, we do not currently know the success rate of the cold emails and there are also cited concerns about the effectiveness of the email templates as well.
- **Examine cold calls/email scripts and any research behind creating them.**
 - This cold call script was analyzed in tandem with survey concerns about potentially not receiving enough training or being able to adapt properly to client questions. The template did match those concerns; it seems more directed for “experts” in maneuvering such conversations vs. novices who may not be able to improvise as well. Our recommendation for this phenomenon is in Section 5.

Section 5: Recommendations

Delegation

Our first recommendation is to delegate the responsibilities of the cold calls/cold emails. At the moment, only the CEO and one intern are involved in this process. We suggest that these duties be spread amongst employees, perhaps in a rotating fashion, or more interns are hired to take over these tasks. Since the CEO has cited being very busy and stressed, and the survey suggests that she does daily cold calls and cold emails and prefers to work more individually, we've inferred that she wears many hats and bears a large workload. It's understandable that the CEO prefers to be involved in this process, as it seems that several existing clients were brought on mainly due to their rapport with the

CEO, but if Personality Pool is to expand, then there are likely other duties that will require more of the CEO's time.

Standardized Training

As an extension of our delegation suggestion, to properly delegate the cold call/cold email tasks, there needs to be more thorough, standardized training, especially relating to cold calls. In the "Employee Comfort with Cold Calling" survey, there were mentioned concerns of how to properly adapt to questions during cold calls, as well as uncertainty about if the respondents have received enough training. After analyzing the cold call script, we've deduced that it's directed more to an audience who has a natural or developed intuition for how to handle these calls. Some of the instructions may be too general or vague for a "new" person to follow, like how to properly weave the potential client industry's issues into the current discussion or how to address if the potential client consistently denies them. We suggest that these training measures be even more concrete and explicitly write out the instructions that may seem obvious, like how to connect the client's industry to Personality Pool's product or how to properly answer client questions. As for adapting to client questions, we also suggest a repository of commonly asked questions/concerns so the employee can be more prepared when these come up.

Quality Over Quantity of Cold Calls/Cold Emails

Our similarly related third suggestion is to lower the amount of cold calls/cold emails, considering the CEO cited to engaging in these on a daily basis. Since there were multiple survey spots regarding concerns over if enough research was done into potential clients, we suggest that it's possible that the amount of cold calls/cold emails limits the thoroughness of the research that needs to be done. Not only that, but there is testimony in the cold call script (the March plan near the bottom) that suggests that cold calls have involved a poor client pool/poor client responses, and further research may strengthen the pool of potential customers to draw from. If there could be an existing employee in Personality Pool or an added employee dedicated to this market research, then other employees could hold off on engaging in cold calls/cold emails until there is more evidence that the customers they're communicating with are a good fit. This more thorough research may also allow for more confidence in phone calls with an increased ability to answer customer questions *and* more confidence in properly tailoring the email template.

Tracking of Cold Call/Cold Email (and Other Marketing Endeavors) Success Rate

Enhancing the organization of the marketing program, since in its current state it appears more informal and reliant on the charisma and rapport of those involved, could be highly beneficial in deciding how and where to take a next step. We suggest dedicated spreadsheets to keep track of daily cold calls/cold emails, client industries, response rate of potential clients, amount of research done on potential clients, etc. This could allow Personality Pool to spot the strong and weak points of which potential customers tend to engage with their messaging. Similarly, if research hours/estimates are tracked, then this could prove whether client research needs to increase while the amount of cold calls/cold emails needs to decrease. As mentioned above, there is testimony in the cold call script (the March plan near the bottom) that suggests that cold calls have involved a poor client pool/poor client responses, adding that a shift to cold emails may be required. This may show that cold emails are more effective than cold calls; however, survey responses also cite concern that cold email templates are *not* effective in starting conversations. This data seems to rely on inferences gathered from personal experiences, but tracking the hard numbers could allow Personality Pool to truly assess the success of their cold calls/cold emails.

As examples, we have created two possible spreadsheets.

[Cold Call Tracker](#)

[Cold Email Tracker](#)

Alternative Marketing Methods to Cold Call/Cold Email

It's possible that neither cold calls nor cold emails are currently as successful as hoped. However, considering existing clients marked in their survey that they joined Personality Pool mainly due to in-person meetings and rapport with the CEO, perhaps the CEO can utilize her charisma in more public-facing events like hospitality/retail/corporate etc. networking events. Another Personality Pool employee suggested podcasts, which is also an option, but networking events could allow for the CEO to directly converse with potential clients. We also may suggest using LinkedIn messages vs. cold calls/cold emails, as businesses may be more inclined to check these messages and probably "expect" them more than they might cold calls/cold emails.

Opportunities for Further Exploration

There are some avenues that could use further data to reach some new answers. For example, the Post-Call/Post-Email Survey was initially intended for potential clients to respond to after their first cold call/cold email experience with Personality Pool so we could assess reasons potential clients may *not* choose to sign up with Personality Pool. While the existing clients' responses were helpful, there is some bias because we know they *did* have a positive experience communicating with Personality Pool and *did* choose to sign up for their services. Discovering what about cold calls/cold emails may push some potential customers *away* could be highly beneficial. Similarly, more thorough survey responses, such as the long-form questions (e.g., "What improvements, if any, do you believe could be made to the cold-emailing process or templates?") could offer more information. In general, more survey responses could give an even greater foundation for moving forward, along with personal interviews of existing clients.

These following tables summarize the recommendations made above with additional details like urgency, priority, cost, resources, people involved, etc.

Reviewing Data Outcomes in Association with Needs

Need	Supporting Data to Verify Need	Level of Urgency	Priority (Low, Moderate, High)	Magnitude (cost + consequences)	Potential resources required to address the need
Training of cold calls/cold emails	Survey responses of uncertainty on if enough training was given for cold calls and uncertainty on how to adapt to customer questions Document analysis of cold call script	Moderate	Moderate	Low cost, internal training documents. Moderate amount of time depending on thoroughness.	CEO expertise for illustrating how she utilizes charisma and rapport during these communications. Interns or other employees needed to undertake training. Documents itself

					could be in job aids or more thorough word docs, Articulate training, etc.
Delegation of work	<p>Survey responses of CEO engaging in daily cold calls/cold emails and how she prefers individual work</p> <p>Communication with CEO where she cited how busy she is</p>	Low to moderate	High	Costs may entail hiring new interns or redistributing workflow.	<p>All employees would be needed to re-distribute workflow effectively.</p> <p>Interns especially would need to take on an increased role here.</p>
Tracking of cold call/cold email success rate	<p>Lack of existing system</p> <p>Survey responses about uncertainty of success rate of existing email template</p> <p>Testimony of shift from cold calls (which were observed to be not working) to</p>	High	High	No additional costs except time it takes to maintain a spreadsheet and to track the amount of research hours.	<p>Google Spreadsheets or Excel.</p> <p>Existing research about client industries.</p> <p>Employee in charge of maintaining spreadsheets.</p>

	cold emails, but no hard data				
Research of potential clients	<p>Survey responses suggesting in multiple places worries about not knowing enough about clients to fully engage in cold calls/cold emails</p> <p>Testimony that existing cold calls involved a bad sample pool</p>	Moderate	High	<p>Costs entail increased workload of research (which may be balanced with decreased cold calls/cold emails). Additional costs could be incurred if a marketing/data expert is hired or consulted.</p>	<p>Likely there should be a repository of potential clients split into different industries and all the research is written up in one place.</p> <p>Potential marketing/data expert or consultant.</p>
Alternative advertising techniques	<p>Testimony that existing cold calls involved a bad sample pool and desire to shift more to cold emails</p> <p>Uncertainty about cold email template</p> <p>Existing clients praise CEO's charisma and cited her as the main reason for</p>	Low to moderate	Low	<p>This could be a wide range. Significant time and money may be utilized to advertise enough to get CEO on podcasts. Additional networking events may cost money to attend. But this should benefit in the long run.</p>	<p>LinkedIn</p> <p>Podcasts</p> <p>In-person networking events</p>

	joining Personality Pool: giving CEO more exposure on social media/podcasts could be beneficial				
--	---	--	--	--	--

Time Required to Address Needs

Need	Time to Address (< 1 year, 2-3 years, >3 years)	Individuals to be involved	Potential resources needed	Dependency on other needs or organizational actions
Training of cold calls/cold emails	<6 months	CEO to try to explicitly convey how she utilizes her own charisma in cold calls Interns Other willing employees	CEO expertise for illustrating how she utilizes her charisma and rapport during these communications. Interns or other employees needed to undertake training. Documents itself could be in job aids or more thorough word docs, Articulate trainings, etc.	Tied with the delegation need, as training other employees to do cold calls/cold emails effectively will free up CEO's time.
Delegation of work	<1 year	CEO Willing employees, most likely	All employees would be needed to re-distribute workflow effectively.	Depends on organization-wide workflow.

		interns	Interns especially would need to take on an increased role here.	
Tracking of cold call/cold email success rate	Ongoing, but can be done ASAP		Google Spreadsheets or Excel. Existing research about client industries. Employee in charge of maintaining spreadsheets.	Depends some on existing knowledge base about clients.
Research of potential clients	Ongoing, but can continue to be done ASAP	Marketing/data experts	Likely there should be a repository of potential clients split into different industries and all the research is written up in one place. Potential marketing/data expert or consultant.	Depends some on workflow redistribution and delegation as well as tracking this research.
Alternative advertising techniques	Ongoing, >3 years		LinkedIn Podcasts In-person networking events	Depends on outside influences of podcasts, in-person networking events, etc.

Appendices

Assessment Tool 1: Post-Call/Post-Email Survey (A.K.A. Post-Introductory Survey)

Rationale: We decided to use a survey in particular because we decided it is the most simple and efficient way to receive information from potential clients after the first cold call/email, especially if they're not receptive to a full interview. We wanted to survey this population in particular so we can assess the reasons for why some companies choose to hire Personality Pool and why others choose not to. If there is an element within the cold email/cold call that either attracts or puts people off, this will be good to know so Personality Pool can meet their goals of gathering more clients.

We would like to gain an understanding of your first experience communicating with Personality Pool representatives. Your responses will help us better support you and other potential clients in the future. Please answer the following questions as honestly as possible. All responses will be kept confidential.

Section 1: Background Information

1. What services does your organization provide?

(Open-ended question)

2. How did you first hear about Personality Pool?

- They cold called me
- They cold emailed me
- I found them on the Internet
- I heard from them from word of mouth
- Other (please specify)

3. For applicants applying to entry level positions, do you have more of a preference for their technical hard skills or personal soft skills?

- Strong preference for hard skills

- Slight preference for hard skills
- Equal preference for hard skills and soft skills
- Slight preference for soft skills
- Strong preference for soft skills
- No preference

4. Does your organization have entry level positions, such as those that rely more on soft personal skills than hard technical skills, that need to be filled?

- Yes
- No

5. If you answered yes to the last question, are you currently hiring or have recently (within the last six months) hired for these positions?

- Yes
- No

6. If you answered yes to the last question, how would you rate the quality of your entry-level applicant pool?

- Very satisfactory
- Satisfactory
- Neutral
- Unsatisfactory
- Very unsatisfactory

7. Could you explain your reasoning for how you rated the quality of your entry-level applicant pool?

(Open-ended question)

8. If you have recently (within the last six months) hired entry-level employees, how satisfied are you with their fit with your organization?

- Very satisfied
- Satisfied
- Neutral

- Unsatisfied
- Very unsatisfied

9. If you are satisfied or very satisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?

- Strongly correlated
- Slightly correlated
- Neutral
- Not correlated at all
- N/A

Can you expand on that?

(Open-ended question)

10. If you are unsatisfied or very unsatisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?

- Strongly correlated
- Slightly correlated
- Neutral
- Not correlated at all
- N/A

Can you expand on that?

(Open-ended question)

Section 2: Call/Email Experience

1. Was your first communication from Personality Pool done through a phone call, email, or other medium?

- Phone call
- Email
- Other (please clarify)

2. If you were cold called or cold emailed, how open were you to engaging with this representative?

- Very open
- Slightly open
- Not open

3. If you were not open to engaging with this representative, what prevented you from feeling receptive to such communication?

(Open-ended question)

4. If you were not open to engaging with this representative, was there something the representative could have said or done that would have made you feel more open to engagement?

(Open-ended question)

5. If you did engage with the Personality Pool representative, how professional was your conversation with them?

- Very professional
- Slightly professional
- Not professional or unprofessional
- Slightly unprofessional
- Very unprofessional

6. How thoroughly did this representative explain Personality Pool's services to you?

- Very thoroughly
- Slightly thoroughly
- Not thoroughly

7. Was there any part of this Personality Pool representative's explanation that caused any confusion, doubt, or reluctance to engage further?

(Open-ended question)

8. How satisfied were you after your initial conversation with this Personality Pool representative?

- Very satisfied
- Slightly satisfied
- Neutral
- Slightly unsatisfied
- Very unsatisfied

Could you expand on your last answer?

9. Was there anything that you think should be changed or added to future cold calls/emails to potential clients?

(Open-ended question)

Section 3: Next Steps

1. After your communication with Personality Pool, what are your next steps?

- Ask for more information from a Personality Pool representative
- Request to sign up for Personality Pool's services
- Decline to pursue any further communication with Personality Pool
- Other (please specify)

2. If you would like to ask for more information from Personality Pool or sign up for their services, what about your communication with them has interested you in maintaining contact?

(Open-ended question)

3. If you chose to decline further communication with Personality Pool, what about your communication with them has prevented interest in maintaining contact?

(Open-ended question)

Could the representative have said or done something differently that might have changed your mind?

- 4. If you want to use Personality Pool's services, in what ways do you think it will serve your organization?**

(Open-ended question)

- 5. If you don't want to use Personality Pool's services, in what ways do you think it will not serve your organization?**

(Open-ended question)

End of Survey

Thank you for completing this survey! Your feedback is invaluable in helping us improve our outreach to potential clients.

Assessment Tool 2: Employee Comfort Level with Cold Calling Survey

Rationale: One of the ways our client drums up business is by utilizing cold call lists. We wanted to determine the comfort level the employees have with cold calling and sending emails to potential clients from those lists. A survey provides us with a direct way to gather information on the employees feelings, needs, and suggestions. The survey questions allow for employees to openly answer questions on their comfort level conducting the task, but also their feelings toward any training and any suggestions they may have to better improve their current training.

We would like to gain an understanding of your comfort level and perceptions of cold calling potential clients. Your responses will help us better support you in this aspect of your role. Please answer the following questions as honestly as possible. All responses will be kept confidential.

Section 1: Background Information

1. Your role in the company?

(Open-ended question)

2. How long have you been in your current role?

- Less than 6 months
- 6 months - 1 year
- 1-3 years
- 3+ years

3. How often do you conduct phone calls to potential clients from the cold call list?

- | | |
|----------------------------------|---------------------------------|
| <input type="checkbox"/> Daily | <input type="checkbox"/> Rarely |
| <input type="checkbox"/> Weekly | <input type="checkbox"/> Never |
| <input type="checkbox"/> Monthly | |

4. How often do you send emails to potential clients from the cold call list?

- | | |
|---------------------------------|----------------------------------|
| <input type="checkbox"/> Daily | <input type="checkbox"/> Monthly |
| <input type="checkbox"/> Weekly | <input type="checkbox"/> Rarely |

Never

Section 2: Comfort Level with Cold Calling

5. How comfortable do you feel when making cold calls to potential clients?

Very Comfortable

Somewhat Uncomfortable

Somewhat Comfortable

Very Uncomfortable

Neutral

6. How confident are you in your ability to effectively communicate with potential clients on cold calls?

Very Confident

Not Confident

Confident

Not Confident at All

Neutral

7. Do you feel you have enough training and support to make cold calls effectively?

Yes, definitely

No, more support is needed

Yes, but more support would be helpful

No, I feel unprepared

Not sure

Section 3: Comfort Level with Email Cold Call Clients

8. How comfortable do you feel emailing potential clients from a cold call list?

Very Comfortable

Somewhat Uncomfortable

Somewhat Comfortable

Very Uncomfortable

Neutral

9. What are your biggest concerns when emailing potential clients for the first time? (Select all that apply)

- Fear of coming across too pushy or aggressive
- Uncertainty about the content or tone of the email
- Concern about legal or compliance issues (e.g.,

GDPR, opt-out regulations)

- Not knowing enough about the client or their needs
- Lack of response from potential clients
- Other (please specify):

Section 4: Factors Influencing Comfort Level

10. Which of the following factors make you feel uncomfortable when making cold calls? (Select all that apply)

- Fear of rejection
- Lack of information about the client
- Uncertainty about what to say

- Fear of sounding too pushy
- Nervousness about speaking on the phone
- Lack of support from the team or manager
- Other (please specify):

11. How do you typically feel before making a cold call?

- Anxious or nervous
- Neutral
- Confident and prepared
- Excited to connect with new clients

Section 5: Email Content and Strategy

12. Which of the following best describes your approach to writing cold emails?

- I follow a specific template and rarely make changes.

- I adapt a template but personalize the content for each client.

I write each email from scratch based on the client's profile.

I struggle to decide how to write the email and often feel uncertain.

13. Do you feel that the company's cold calling email templates are effective in initiating conversations with potential clients?

- Yes
- No
- Not sure

14. What improvements, if any, do you believe could be made to the cold-emailing process or templates?

(Open-ended response)

Section 6: Support and Improvement

15. What kind of support or resources would help you feel more comfortable with cold calling? (Select all that apply)

- More training on communication techniques
- Scripts or templates for calls
- Role-playing sessions

- More detailed client background information
- Regular feedback from managers
- Access to a mentor or coach
- Other (please specify):

16. Would you prefer more team collaboration or individual work when making cold calls?

- More team collaboration (e.g., team calls, group meetings)
- A mix of both team and individual work
- More individual work (e.g., solo calls with minimal collaboration)

17. Do you feel that you have received sufficient training or resources on how to email potential clients?

- Yes
- No
- Somewhat

18. How confident are you in your ability to craft an email that will engage a potential client?

Very Comfortable

Somewhat Uncomfortable

Somewhat Comfortable

Very Uncomfortable

Neutral

Section 7: General Feedback

19. What do you enjoy most about cold calling?

(Open-ended question)

20. What challenges do you face when making cold calls, and how do you overcome them?

(Open-ended question)

21. Is there anything else you would like to share about your experience with cold calling?

(Open-ended question)

22. Do you have any additional feedback on how to improve the comfort and effectiveness of emailing potential clients?

(Open-ended response)

End of Survey

Thank you for completing this survey! Your feedback is invaluable in helping us improve the client recruiting process and provide better support to all employees.

Interview: Current Clients

The purpose of this interview is to gain a better understanding of why employers have chosen Personality Pool and the experience they have had so far. We would like to gather information on how they have seen improvements in staffing. These questions not only focus on personal “feelings”, but the data behind their staffing.

- 1.) What made you choose Personality Pool for your staffing needs?
- 2.) How did you initially hear about Personality Pool?
- 3.) How do you feel about the customer service that has been provided?
- 4.) What training has been provided on the use of the Personality Pool product? What have you liked/disliked about the training?
- 5.) Have you seen an improvement in candidates that applied for open positions? How so?
- 6.) Have you seen an improvement in the quality of those hired since using Personality Pool? How so?
- 7.) Have you seen an improvement in length of employment since using Personality Pool? Can you give us examples?
- 8.) Would you recommend Personality Pool to fellow businesses?

MEMORANDUM OF UNDERSTANDING (MOU)

Between

Stephanie Roller, Nicole Manley, and Casie McClellan

and

Personality Pool

This is an agreement between Stephanie Roller, Nicole Manley, and Casie McClellan, hereinafter called “the consultant” and Personality Pool, hereinafter called “the client”.

I. PURPOSE and SCOPE

The purpose of this MOU is to clearly identify the roles and responsibilities of each party as they relate to the implementation of the needs assessment that the consultant will conduct for Personality Pool regarding expanding their clientele in different sectors. In particular, this MOU is intended to establish clear guidelines regarding the work that will be conducted.

II. BACKGROUND

The purpose of this project is to conduct a needs assessment for Personality Pool to both evaluate whether they are *currently* reaching their ideal customer and how to *expand* into other sectors. They want to garner more business and sales, but want to work with the consultant to explore if there are A) any roadblocks in their way of growing and B) what direction they should grow towards.

Personality Pool is a personality screening tool designed for employers to implement. They have the desire to make sure employers are hiring the right candidates for the job, by pairing the right job and the right personality. They are achieving this by asking 3-5 video questions, pertaining to the job opening, that are available to review after the candidate has completed them. They are currently working with companies in sales roles and retail. Personality Pool is

currently expanding into healthcare, child care, and elder care, but would like to move into hospitality, trades, and corporate. The focus is entry-level careers where personality may outweigh experience or education.

Personality Pool is looking to extend their client database and reach into new markets. The current “marketing” strategies are limited to cold calls and emails. Our objectives are to look at the effectiveness of current “marketing” strategies and see where other options could be implemented for the desired growth. These other options can involve looking at effectiveness in current markets, tailoring marketing to specific markets, and reviewing collected data.

Objectives:

- Collect opinions from Personality Pool employees on potential for company growth.
- Identify potential organizational issues that might serve as an obstacle for company growth.
- Examine cold calls/email scripts and any research behind creating them.
- Discuss rationale for current marketing strategy.
- Determine if current clientele are the “ideal” clients for Personality Pool.
- Examine client response rates of current marketing techniques.
- Evaluate the satisfaction levels of current clientele (retention rates of employees, hiring rate, hiring rate, etc.).
- Compare differences of satisfaction levels between different sectors (retail, healthcare, etc.).
- Assess possibilities for new client bases.
- Explore alternative marketing strategies, like advertising and enhanced social media presence.

III. Consultant RESPONSIBILITIES UNDER THIS MOU

Our role as the consultant is to work with the client to evaluate the problem areas and growth areas they’ve expressed seeing. We will run a needs assessment to identify the causes behind the problems (if the client is ideal, or if there is an internal issue that has nothing to do with the client) and evaluate what the best methods of growth might be (if it is related to the marketing plan or another avenue). Once we’ve narrowed down the causes, we will develop solutions with the client.

Project Deliverables: data analysis report, final report and client

recommendations, list of instructional and non-instructional interventions

IV. Client RESPONSIBILITIES UNDER THIS MOU

The client will need to provide the current script used for cold calls and emails, data on how the calls and emails are affecting their new clientele numbers, general cost of a “subscription” to Personality Pool and everything the subscription cost includes, possible information on current clients and the data that supports their usage, and training provided to Personality Pool employees and clients on how to use the video technology,

Additional support from the client may include additional information needed or additional questions about the client’s goals and concerns.

V. Project Timeline

Date	Task	Estimated Hours	Completed By
2-24-25	Data Collection Tools	5	2-28-25
4-07-25	Data Analysis Report	4	4-11-25
4-28-25	Final Report and Client Recommendations	6	5-02-25
Ongoing	Project Reflections	5	Ongoing

VII. Client Contact Information

Personality Pool
Lauren Mullins
434 Shelby St.
Kingsport, TN 37660

Lauren@personalitypool.com

VII. EFFECTIVE DATE AND SIGNATURE & Written Documentation

This MOU shall be effective upon the signature of Stephanie Roller, Nicole Manley, Casie McClellan and Personality Pool’s authorized officials. It shall be in force from *January 31st, 2025* to *January 31st, 2026*

Stephanie Roller, Nicole Manley, and Casie McClellan and Personality Pool indicate agreement with this MOU by their signatures.

Signatures and dates

Stephanie Roller, Nicole Manley, Casie McCellan

Stephanie Roller

_____01/31/25_____
Date

Nicole Manley

_____01/31/25_____
Date

Casie McCellan

_____01/31/25_____
Date

Personality Pool

Date