

AdvisorDNA™

SALES ARCHETYPES AND THE BEHAVIOURAL DRIVERS OF DEVELOPMENT

Understanding how sales professionals think, sell, collaborate, and adapt.

A research-informed framework for sales self-awareness, personalized coaching, and team development.

Prepared by Robert A. Dougan, M.A.

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Executive overview

Sales professionals do not all achieve success in the same way. Some thrive through competition, independence, and an unwavering focus on results. Others succeed by building relationships, adapting to different personalities, and balancing competing priorities. Still others rely on technical expertise, structure, and a methodical approach to solving client problems.

AdvisorDNA™ was developed around a fundamental principle: sales success cannot be defined by a single ideal personality profile.

For nearly 25 years, our behavioural research has focused on helping organizations identify and replicate the characteristics associated with successful sales professionals. Selecting individuals whose behavioural characteristics align with proven success profiles remains an important strategy for building high-performing sales organizations. However, extensive research and practical experience have also reinforced an important reality: personality is complex, and even the strongest selection processes have limitations. Successful salespeople can achieve results through different behavioural approaches, and selecting for potential does not eliminate the need for ongoing development.

This recognition helped shape the creation of AdvisorDNA™. While identifying the characteristics associated with success remain valuable, developing the talent already within an organization represents an equally important opportunity. Rather than attempting to define one ideal salesperson, AdvisorDNA™ provides a practical developmental framework for understanding how sales professionals approach goals, relationships, decision-making, and complexity—and how greater self-awareness, personalized coaching, and behavioural adaptability can help individuals build on their strengths and improve their effectiveness.

Developed by RAD Potential Advisory Inc., the framework draws on nearly 25 years of behavioural research experience, psychographic profiling expertise, sales performance analysis, and professional development experience.

At its foundation is the AdvisorDNA™ Identifier™, a proprietary 15-question self-report questionnaire designed to help individuals explore their current selling tendencies. The Identifier provides insights into three primary sales archetypes:

- The Competitor — goal-driven and achievement-oriented.
- The Equalizer — balanced, relationship-conscious, and adaptable.
- The Technician — structured, analytical, and expertise-oriented.

These orientations can combine to create blended archetype profiles. The results power AdvisorDNA™ Navigator, an AI-assisted sales development platform that translates behavioural self-awareness into practical coaching, interpersonal pairing, team dynamics, and scenario-based guidance.

The objective is not to predict sales performance or determine who should be selected for a role. It is to help sales professionals understand how they currently operate and expand their behavioural flexibility.

1 The foundation of AdvisorDNA™

Grounded in research. Informed by experience. Designed for development.

AdvisorDNA™™ was developed by Robert A. Dougan, M.A., drawing on an extensive career in behavioural research, psychographic profiling, sales performance analysis, and organizational development. His master's degree included graduate research focused on psychographic profiling and consumer behaviour.

Over nearly 25 years, he has worked with approximately 300 organizations across North America and international markets, conducting and overseeing hundreds of behavioural validation studies, sales performance benchmarking initiatives, and organizational research projects. He has also trained more than 10,000 sales leaders across four continents.

Challenging the idea of one ideal sales profile

Through years of studying sales performance and behavioural characteristics, an important observation emerged: successful salespeople did not necessarily demonstrate one consistent behavioural profile. Some achieved results through assertiveness and competitive drive; others balanced relationships and performance; still others relied on technical knowledge, structure, and disciplined execution.

These recurring observations informed a hypothesis that successful sales professionals may achieve results through distinctly different behavioural orientations. Subsequent exploratory statistical analysis of historical financial-services assessment data helped investigate and refine that hypothesis.

The resulting framework was organized around the Competitor, Equalizer, and Technician archetypes. They are practical developmental descriptions, not fixed personality classifications or scientifically established categories applicable to every sales population.

2 The AdvisorDNA™ Identifier

A proprietary lens into selling behaviour

RAD Potential Advisory Inc. independently developed the AdvisorDNA™ Identifier™, an original 15-question self-report questionnaire with its own scoring methodology. It is designed to help sales professionals reflect on their current preferences and behavioural tendencies, not predict job performance or support employee selection.

The questionnaire explores approaches to achievement, relationships, decision-making, structure, and selling challenges. Independently developed scoring rules indicate relative orientation toward three primary archetypes, with blended orientations yielding nine possible archetype outcomes.

Orientation	Developmental focus
Goal and achievement	Objectives, initiative, competition, and results
Relationship and adaptability	Collaboration, communication, and competing priorities
Structure and expertise	Detail, planning, complexity, and problem-solving

These orientations provide a practical framework for reflection; they are not presented as independently validated psychometric scales.

A snapshot, not a permanent label

The Identifier explores self-reported tendencies at the time of completion. Some preferences may remain consistent, while others may evolve through experience, circumstances, coaching, and deliberate practice. Periodic reassessment is encouraged as a prompt for reflection, but changes in results should not automatically be interpreted as proven behavioural improvement.

AdvisorDNA™ does not tell someone who they are permanently. It helps them explore how they currently approach selling and where they might expand their behavioural range.

3 The three sales archetypes

The Competitor

THE GOAL-DRIVEN ENTREPRENEUR

Competitors tend toward achievement, independence, initiative, and measurable outcomes. They may prefer autonomy, clear objectives, and opportunities to influence results. Their selling approach may be direct, assertive, and focused on moving opportunities toward decisions.

Potential strengths

- Strong achievement and goal orientation
- Initiative and independent decision-making
- Creating momentum and pursuing opportunities
- Confidence in challenging assumptions and overcoming obstacles

Potential development opportunities

Patience, active listening, collaboration, and adjusting pace for clients or colleagues who require more time and information.

Coaching considerations

Clear objectives, direct feedback, autonomy, and measurable development goals.

The Equalizer

THE BALANCED ADAPTOR

Equalizers tend to balance relationships, achievement, and situational demands. They may adapt communication and decision-making across people and environments, navigating competing priorities while attending to both relationships and results.

Potential strengths

- Balancing interpersonal and performance considerations
- Adapting communication to different situations
- Building alignment among stakeholders
- Managing competing priorities and perspectives

Potential development opportunities

Decisiveness, prioritization, and stronger positioning when competing demands create uncertainty.

Coaching considerations

Collaborative discussions, balanced goals, prioritization exercises, and decision-making frameworks.

The Technician

THE PROCESS-ORIENTED SPECIALIST

Technicians tend to value expertise, structure, accuracy, and thoughtful decision-making. They may prefer clear expectations, careful evaluation of information, and detailed analysis of client needs.

Potential strengths

- Technical knowledge and subject-matter expertise
- Detailed analysis and structured problem-solving
- Planning, preparation, and consistency
- Supporting informed client decisions

Potential development opportunities

Urgency, simplifying complex information, decisiveness, and advancing opportunities before every detail is resolved.

Coaching considerations

Structured plans, clear expectations, practical scenarios, and practice in concise communication and decision-making.

No single archetype is best

Each orientation may offer advantages depending on the individual, client, role, and environment. AdvisorDNA™ does not establish a hierarchy or suggest that any profile guarantees superior results. The objective is to recognize tendencies and practise alternative approaches when circumstances require adaptability.

4 From behavioural insight to development

Understanding behavioural tendencies is only the beginning. The greater opportunity comes from applying those insights to coaching conversations, relationships, team collaboration, and sales challenges.

Personalized coaching

Navigator provides coaching suggestions informed by an individual's self-reported orientation. A Competitor may appreciate direct feedback and measurable goals; a Technician may prefer a structured development plan. These are starting points for discussion, not definitive predictions. Managers should combine them with observation, performance conversations, and personal goals.

Interpersonal pairing

Pairing helps individuals explore similarities, complementary tendencies, and possible sources of friction. An action-oriented salesperson and an analytical colleague may approach the same opportunity differently. Pairing insights are developmental hypotheses, not validated predictions of compatibility.

TeamDNA

TeamDNA visualizes self-reported archetype orientations within a group and supports discussion of communication, decisions, misunderstanding, collaboration, and shared learning. It does not scientifically rank teams or predict team performance.

Scenario Assistant

The AI-assisted Scenario Assistant helps users consider alternative responses to objections, conflict, different client preferences, and stalled opportunities. Its purpose is to support practice, reflection, and behavioural adaptability.

5 A developmental, not prescriptive model

AdvisorDNA™ is not intended to define an ideal sales personality. It helps individuals understand their current selling tendencies, recognize where those tendencies may support or limit effectiveness, and identify opportunities for growth.

The Identifier uses opinion-based questions to provide a structured lens into self-perceived selling approaches. Behavioural approaches can evolve through experience, feedback, and practice; ongoing reflection and periodic reassessment are encouraged.

The objective is not to force everyone toward one archetype. It is to help individuals become more intentional, flexible, and adaptable in how they sell.

Development through self-awareness

Recognizing preferred approaches can help individuals notice situations in which their natural tendencies are helpful and situations in which another response may be more effective. For managers, these insights offer additional context for coaching. The framework is a starting point for reflection and discussion, not a definitive explanation of behaviour.

6 An evolving research-informed framework

AdvisorDNA™ Navigator combines professional expertise, behavioural research experience, and independently developed technology in a practical sales development environment. The current Identifier is not presented as a psychometrically validated predictor of sales success or a diagnostic personality assessment.

Building an independent research foundation

RAD Potential Advisory Inc. intends to develop an independent research database using appropriately consented and de-identified questionnaire responses collected directly through the Identifier. This work may help evaluate:

- Questionnaire response patterns and distributions
- Relationships among questions and archetype orientations
- Consistency and stability of scoring outcomes
- Differences across sales populations
- Opportunities to refine the questionnaire and framework

Future research may also examine changes in responses over time and users' experiences of developmental applications. Optional research participation will be voluntary, with privacy safeguards and separation of research data from identifiable account information.

The intention is to evaluate and improve the framework while remaining transparent about what the available evidence does and does not establish.

7 The future of sales development

Traditional sales training often applies common methods across an entire salesforce, even though individuals approach the same challenges differently. AdvisorDNA™ Navigator offers a complementary approach by introducing behavioural self-awareness into ongoing development.

Through its proprietary questionnaire and AI-assisted applications, the platform helps individuals and managers explore how selling tendencies may influence coaching, communication, collaboration, and decision-making.

The future of sales development is not about creating one ideal salesperson. It is about helping individuals understand their strengths, recognize limitations, and adapt to different selling situations.

Methodology and intended use

The AdvisorDNA™ archetype framework was developed by RAD Potential Advisory Inc., informed by professional experience and earlier behavioural research involving financial-services sales professionals. The current Identifier is a separately developed, proprietary 15-question self-report questionnaire with independently designed scoring rules.

It does not administer or reproduce questions from other assessments or use their proprietary scoring algorithms, scales, norms, or official interpretations to generate results. Historical research origins should not be interpreted as independent psychometric validation of the current Identifier.

AdvisorDNA™ Navigator is intended for self-awareness, coaching, communication, interpersonal collaboration, team development, and scenario-based learning. It is not designed or validated for employee selection, personnel ranking, or employment decision-making. AI-generated guidance should be treated as suggestions for reflection rather than definitive psychological conclusions.

About the developer

Robert A. Dougan, M.A.

Founder & President, RAD Potential Advisory Inc.

Robert Dougan is a behavioural research and sales performance professional with nearly 25 years of experience in psychographic profiling, assessment research, sales development, and organizational performance. His master's research focused on psychographic profiling and consumer behaviour.

He has worked with approximately 300 organizations across North America and international markets, conducted and overseen hundreds of behavioural validation and benchmarking studies, and trained more than 10,000 sales leaders across four continents.

Through RAD Potential Advisory Inc., he developed AdvisorDNA™ combining professional experience with proprietary questionnaire technology and AI-assisted development tools.

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