

SELECT for Mortgage Processor

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Survey Results for Robin Example

ID:

Test Date: 3/23/2012 3:41:51 PM

Organization: 000/00[{] æ ^

This Report Is Confidential

- Lock it up
- Don't leave it out
- Don't show it to the candidate

Use This Report To Make Good Decisions

- Retest or avoid candidates with Invalid results
- Avoid candidates with Avoid scores
- Use interview probes and other report information to evaluate Okay, Good or Better candidates.
- Combine information from all sources (survey, interview, references, etc.) to make a final decision.

SELECT for Mortgage Processor **Results**

Random Response:

A check for random responding. If Invalid, the candidate could not or did not read the test well enough to avoid responding randomly, and these results should not be used.

Valid	Invalid
X	

Integrity Index:

A measure of the candidate's attitudes about personal integrity and work ethic.

Score 11	Avoid	Good
	X	
	0-7	8-13

In-store Banking Sales Associate Performance Index:

A measure of the traits associated with successful performance in this job.

Score 44	Avoid	Okay	Good	Better
	X			
	0-41	42-44	45-50	51-55

Banking Sales Associate Performance Index:

A measure of the traits associated with successful performance in this job.

Score 38	Avoid	Okay	Good	Better
	X			
	0-35	36-38	39-44	45-48

Performance Sub-scale Analysis:

The tables below present the candidate's scores for each of the sub-scales of the Traditional Banking and In-store Banking Performance Indices. Flagged areas should be probed in the interview.

Banking Sales Associate Performance Index Subscale:	Okay	Flag*
Interpersonal Influence (can influence others in a sales role)	X	
Positive Service Attitude (is positive about other people and the customer-service role)		X
Energy (activity level; action orientation; personal effort)		X
Social Comfort (at ease with others, enjoy social interaction)	X	
Accommodation to Others (desire to accommodate the needs of others)	X	
Dependability (follows through on tasks; conscientious)	X	
Resilience (ability to handle frustration and pressure)	X	
Process Focused (can work within ordered processes and procedures; is organized)	X	
Objective Performance (preference for objective performance measures)	X	
Acceptance of Diversity (tolerance of others different from self)	X	

*If flagged, see interview probe suggestion(s) in later section.

In-store Banking Sales Associate Performance Index Subscale:	Okay	Flag*
Interpersonal Influence (can influence others in a sales role)	X	
Positive Service Attitude (is positive about other people and the customer-service role)		X
Energy (activity level; action orientation; personal effort)		X
Social Comfort (at ease with others, enjoy social interaction)	X	
Accommodation to Others (desire to accommodate the needs of others)	X	
Dependability (follows through on tasks; conscientious)	X	
Resilience (ability to handle frustration and pressure)	X	
Process Focused (can work within ordered processes and procedures; is organized)	X	
Objective Performance (preference for objective performance measures)	X	
Acceptance of Diversity (tolerance of others different from self)	X	
Multi-Tasking (ability to handle multiple tasks at one time)	X	
Self-Reliance (handles tasks independently with little support from others)	X	

*If flagged, see interview probe suggestion(s) in later section.

Job Task Responses:

How willing are you to . . .	Would do it and enjoy it	Would do it	Would do it, but not like it	Would not want to do it	Would not do it
Work evenings or nights?			X		
Work weekends?			X		
Be required to meet sales quotas?		X			
Work weekdays?		X			
Commit to being on time, every time?	X				
Adjust work schedule on short notice?		X			
Keep branch/work space organized and tidy?	X				
Serve or assist customers?	X				
Work cooperatively with others?	X				
Handle cash transactions?		X			
Aisle selling to store customers?			X		
Answer telephone inquiries?	X				
Handle customer complaints?		X			
Make public announcements?		X			
Promote services to customers?	X				
Operate the computer and software systems?	X				
Make cold calls to current and potential customers?		X			
Help implement marketing promotions?	X				
Make service recommendations to customers?	X				
Contact potential customers to explain the variety of banking services you offer?		X			
Work in an environment that requires you to rely on and work closely with co-workers as part of a team?	X				
Work in a confined work space for extended periods of time?			X		

The table above reports the candidate's stated willingness to do tasks commonly required in jobs similar to this one. Indications of reluctance should be probed during the interview.

.....**Counterproductive Behaviors**

In this section, undesirable responses by the candidate to theft, job commitment, work ethic, resistance to direction, safety, etc. questions are presented. The total number of survey questions for each topic is given in parenthesis. The candidate selected an undesirable response to the following:

JOB COMMITMENT (10 possible questions)

- How many employers have you had in the last three years? . . **Three**

WORK ETHIC (6 possible questions)

- It would bother you very much if you knew another employee was losing the company money by wasting time. . . **Disagree**

"
"

Preparation:

- Review the application form
- Review the test results

STEP 1: Open the Interview

Hello, my name is _____ and I'm the _____ (your position). We're pleased that you are interested in this position. The purpose of this interview is to learn more about you and your work experiences. I will be asking you some questions about your previous experience, how you approach certain things, etc. You will probably see me jotting down some notes -- that's to help me remember better what you said after the interview is over. There are no correct or incorrect answers; what we want is to learn more about you. At the end, I'll leave some time to answer any questions you might have. If you are ready, we can begin.

STEP 2: Review the Application, the Job Task Checklist, and Investigate Potential Problem Areas

- | | |
|--|--|
| <input type="checkbox"/> All blanks completed? | <input type="checkbox"/> Employment gaps? |
| <input type="checkbox"/> Application signed? | <input type="checkbox"/> Extremely high or low earnings? |
| <input type="checkbox"/> Several jobs in the last 2 years? | <input type="checkbox"/> Earnings show progress? |
| <input type="checkbox"/> Vague reasons for leaving job(s)? | <input type="checkbox"/> Can complete all essential functions? |

Example Questions

I see that you were unemployed from _____ to _____. Please tell me about this period of unemployment.

I see that you left your previous employer. Would you explain further?

I noticed that you have changed jobs frequently in the recent past. Why?

STEP 3: Review Test Flags and Begin In-depth Questions

While asking the following interview questions, be sure to listen and probe in the following areas:

- Low Positive Service Attitude
- Low Energy Level

1. Tell me briefly about your last job. Which aspects did you like most? Also, which did you like the least? Please provide me with examples of each of these tasks. (*Listen for how the candidate's preferences relate to the in-store or branch role and how they might fit in the work environment.*)

2. Describe the type of work environment you like the best? The least? Can you provide examples of these types of work environments in other jobs? (*Probe regarding specific tasks, people, physical work environment, and work schedule. How does this fit with your in-store or branch environment?*)

3. Did you ever work in a job that required you sell to the public? Did you have quotas or sales goals to meet? How were you paid? Hourly? Commission? Compared to others with whom you worked, how well did you do? - top third, middle third, bottom third? *(Listen for what motivates him/her? Also, listen for ability to meet and exceed goals.)*

4. Describe a time when you successfully approached a customer (or someone else if no prior customer experience) and persuaded them of something. Why do you think this attempt was successful? Describe your typical approach in selling a product or service to a customer. What is your process? Can you describe a time when your efforts to sell or persuade someone failed? *(Listen for his/her ability to successfully influence a customer (or potential customer). Also, listen for self-reflection and taking responsibility vs. blaming others (or giving excuses) when unable to persuade a customer.)*

5. What type of boss do you prefer and why? Please provide an example from your past experience of a boss you enjoyed working for and a boss you did not enjoy working for. *(Listen for whether or not their preferences fit with the supervisory structure of your in-store or branch environment.)*

6. What type of co-workers do you like to work with and why? Please provide an example from your past experiences of co-workers you enjoyed working with and co-workers who you did not enjoy working with. *(Listen for whether or not their preferences fit with the teamwork environment of your in-store or branch environment.)*

7. What kinds of things frustrate or irritate you at work? How do you handle them? Please give me an example of the situation and how you reacted. *(Listen for things that relate to the frustrations typical for your in-store or branch environment such as competing demands, difficult or un-knowledgeable customers, working closely with other people, etc. Listen for how the candidate handles these frustrations.)*

8. If you have had customer contact experience in the past, describe to me a situation in which you approached a customer. What did you typically say? If you do not have prior experience, describe for me how you would approach a customer in our branch or in the store. What would you say? *(Listen for whether or not this candidate will have good judgment and smooth interpersonal communication with customers.)*

9. Tell me about a time when a customer did not want to buy your product or service. What did you do or say? If you do not have prior experience, what would you do or say? *(Listen for good judgment, tact and interpersonal smoothness with customers, not giving up too easily, but not being too persistent.)*

10. Sooner or later, we all have to deal with a customer who has unreasonable demands. Think of a time when you had to deal with an unreasonable request. What did you do? *(Listen for tact and good judgment in dealing with customers and handling difficult requests.)*

11. Tell me about a time when you were unsure of what a customer needed. What did you do? How was the situation resolved? *(Listen for an ability to listen to the customer and not just sell them what is being promoted, but what they need.)*

12. Tell me about a time you went above and beyond your job responsibilities to ensure the success of your team, department, store, branch, etc. *(Listen for a willingness to take initiative to achieve group goals and to set a good example for others.)*

13. Tell me about the personal goals you set for yourself in your last job. What actions did you take to meet those goals? How did you measure your success? How did these personal goals relate to the broader organizational or department goals? *(Listen for initiative, knowledge of company goals, and ability to set reasonable goals that align with the organization.)*

14. Tell me about a time you encountered barriers to making something happen, such as a personal goal, a sale, etc. What happened? *(Listen for persistence and resilience.)*

15. What are your future career goals? How long do you see yourself staying in this current role if you are hired? What would be the next step for you? *(Is this job a stop-gap, or is the candidate considering a future with the organization? Is this consistent with their prior work experience? What type of potential do they have for promotion?)*

If you are still concerned about the Performance Flag areas, here are some additional questions to ask:

Low Positive Service Attitude: Describe the pluses and minuses of a sales job and working with customers. What do you like about these types of jobs? What do you not like? (*Listen for suggestions that the candidate may have a defensive or negative attitude, especially about helping or doing things for customers or other people.*)

Low Energy Level: Describe your preferred work pace. In what types of work situations would you like to be more energetic? (Listen for answers that suggest that the candidate can't handle the pace of the job, or can't self-start to get the job done.)

STEP 4: Conclude the Interview

- Your goal is to bring the interview to a close.
- End on a positive, but not promising, note.
- Ensure that the candidate feels that he/she has been able to give you a complete and accurate picture of him/herself.
- Explain the next step in the process and time frame as appropriate.

Example Closing:

- *"Unless you have any additional questions for me, we will conclude our discussion. I want to thank you for taking the time to speak with me. Someone will contact you by _____, but feel free to contact me if you have not heard anything by then. Thank you again for your time."*

STEP 5: Make the Hiring Decision

- Resist the temptation to hire someone just because you need to fill the job. You are likely to pay for a hiring mistake both in money and time.
- Focus on how well the candidate fits the demands of the job, not how much you like the candidate's personality or how much you have in common with the candidate.
- The selection process is designed as an aid to the well-reasoned judgment of a hiring manager, not a replacement for this judgment. In the end, every hiring decision is a judgment call. Use the tools provided in this process to inform your decision, not

SELECT for Banking Sales Associates Combo v3 **Interview**

Use the following checklist to guide your decision. Please indicate your recommendation and write your comments in the appropriate Recommendation box. In addition, write your initials in the Initials column.

Actions	Recommendation			Initials
Review Application	Not Acceptable	Some Reservations	Consider Further	
Prescreen (Optional)	Not Acceptable	Some Reservations	Consider Further	
Test Candidate & Review the Test Results	Not Acceptable	Some Reservations	Consider Further	
Behavioral Interview	Not Acceptable	Some Reservations	Acceptable	
Reference Checks (Optional)	Not Acceptable	Some Reservations	Acceptable	
Background Check (Optional)	Not Acceptable	Some Reservations	Acceptable	
Decide	Do Not Make Offer	Eligible At Later Date	Make Offer	
Drug/Medical Screen (Optional)	Fail		Pass	

SELECT for Banking Sales Associates Combo v3 **Development Suggestions**

STEP 6: On-boarding and Development (Optional for New Hires Only)

(Caution: Before providing these to your new hires, please check with your company's Human Resource department to confirm that your company is using this option.)

Congratulations on adding a new member to your team! As a Hiring Manager you play a key role in the success of your new team members.

The following link will give you access to Development Suggestion page(s) that could be provided to your new employee to assist them with their future development efforts. To support your new hire's on-boarding and development, we encourage you to provide feedback as they proceed through training. You are their partner in development and can provide them with valuable information to help develop their skill set and increase their effectiveness as an employee. **THESE PAGES ARE FOR NEW HIRES ONLY. DO NOT PROVIDE THESE PAGES TO A CANDIDATE UNTIL THEY HAVE BEEN HIRED.**

[Developmental Suggestions Link](#)

Development Suggestions

Congratulations on joining our team! We want our team members to be as successful as possible right from the start, and the purpose of this report is to help you along that path. This information, along with the feedback you receive from your manager during your training, will help you to develop your skill set and increase your overall effectiveness in the role.

As part of the selection process you completed an assessment tool which measures characteristics that have been proven to have an impact on success in this type of role. Based on your responses we have identified one or more development areas for you. These are highlighted in the Development Suggestion section below. You will find that by working to develop your skill set in this area(s), you can learn to be more effective by managing your behavior at work therefore putting yourself in the best position to succeed in this role.

Low Energy/ Work Pace

A review of your answers to the assessment suggests that your work style is likely to be methodical and slow-paced. If you need to improve in this area, consider the following suggestions:

- Make a “to do” list of your tasks at the beginning of each day. Rank them in order of importance and focus on the highest priority ones first.
- Set deadlines for completing a task and stick to these. Sometimes it also helps to make a time schedule for each and every step involved.
- If you find yourself lacking energy during the day, try to determine why and address the cause. Do you get enough sleep or exercise? Is there something on your mind that is draining your energy?
- Don't jump around among several unfinished tasks. It's easier to keep your focus when it isn't divided. Finish the most important tasks and then be purposeful in your intent to complete the rest.
- Make it easy to finish things once you start. Have the tools or information you will need close at hand.
- Don't hold out for perfection. Recognize that not everything needs to be - or even can be - flawless, and aiming for this is unproductive.
- When you find yourself losing focus, take a short break. Get up, walk around, and then go back to work.

Low Positive Service

Your responses to the assessment suggest that you may be less trusting and positive of others in the workplace than most people. It could be that you are cautious in general or perhaps you have felt taken advantage of by previous customers, employers, or co-workers. In either case carrying this skepticism into your new role may hinder your ability to respond favorably to others' needs/requests and to make the effort to do more than is required to ensure high customer satisfaction. To develop more positive service attitudes consider the following suggestions:

- Begin by placing yourself in your customer's shoes. What expectations would you have for service at your company? How can you best meet or exceed those expectations?
- Think about times when you have been a customer and received poor service. What would you want the person representing the company to do? Focus on giving the customer what you would expect if you were in their position.
- Try to view every customer as someone who could have a powerful impact on your future. They might write a letter (good or bad) to your boss. They might possibly be someone you could need help from at a later date or even encounter on a future job interview. Remember that you never know if or when your actions today will come back to haunt you tomorrow.
- Even when customers are difficult, it is your job to be polite and respectful. Although you may not agree with them, remember to be professional and objective when dealing with them. Follow your company's guidelines and answer their questions in a considerate manner.