

# SELECT for Banking Sales Associates

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## *Survey Results for Eric Example*

ID:

Test Date: 7/2/2007 10:35:04 AM

Organization: Generic Banking

### **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 Banking Sales Associates **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	

**Math Index:**

A measure of math calculations and basic numerical reasoning skills.

Score: <b>14</b>	Needs Training	Okay
		X
	0 - 12	13 - 18

**Integrity Index:**

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

Score: <b>12</b>	Avoid	Good
		X
	0-7	8-13

**Performance Index:**

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

Score: <b>20</b>	Avoid	Okay	Good
		X	
	0 - 35	36 - 38	39 - 48

**Performance Sub-scale Analysis:**

The table presents the candidate's scores for each sub-scale of the Performance Index.

Flagged areas should be probed in the interview.

Subscale	Okay	Flag*
<b>Interpersonal Influence</b> (can influence others in a sales role)	X	X
<b>Positive Service Attitude</b> (is positive about other people and the customer-service role)	X	
<b>Energy</b> (activity level; action orientation; personal effort)	X	X
<b>Social Comfort</b> (at ease with others, enjoy social interaction)	X	X
<b>Accommodation to Others</b> (desire to accommodate the needs of others)	X	
<b>Dependability</b> (follows through on tasks; conscientious)	X	X
<b>Resilience</b> (ability to handle frustration and pressure)	X	X
<b>Process Focused</b> (can work within ordered processes and procedures; is organized)	X	
<b>Preference for Objective Measures</b> (preference for objective performance measures)	X	X
<b>Acceptance of Diversity</b> (tolerance of others different from self)	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 weekends?		X			
Work weekdays?			X		
Commit to being on time, every time?	X				
Be required to meet sales quotas?		X			
Adjust work schedule on short notice?			X		
Keep branch/work space organized and tidy?		X			
Serve or assist customers?	X				
Handle cash transactions?	X				
Answer telephone inquiries?	X				
Handle customer complaints?		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				

SELECT for Banking Sales Associates **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:

ILLEGAL DRUG USE (4 possible questions)

- There should be mandatory drug screening for some jobs to ensure the safety of self and others. . . **Disagree**

JOB COMMITMENT (10 possible questions)

- You have had difficulty getting to work (or school) on time. . . **Agree**
- Most supervisors accept that you cannot always call in for an absence. . . **Agree**

RESISTANCE TO DIRECTION (5 possible questions)

- In the past, you have had difficulty getting along with supervisors (or teachers). . . **Agree**

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SELECT for Banking Sales Associates **Interview**

**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 and Investigate Potential Problem Areas**

- |                                       |   |
|---------------------------------------|---|
| ___ All blanks completed?             | ___ Employment gaps?                      |
| ___ Application signed?               | ___ Extremely high or low earnings?       |
| ___ Several jobs in the last 2 years? | ___ Earnings show progress?               |
| ___ Vague reasons for leaving job(s)? | ___ 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 for personal reasons. 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 Persuasiveness
- Low Energy Level
- Low Social Comfort
- Low Dependability
- Low Resilience
- Low Comfort with Objective Performance Criteria

**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 sales associate 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 the sales associate 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?

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?

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 branch.)*

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 branch.)*

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 the in-store environment such as competing demands, difficult or un-knowlegable 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 persistant.)*

**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?

**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 Persuasiveness:** Tell me about situations in which you were required to influence the decisions or actions of others. When are you convincing? When are you not? (*Listen for an ability to persuade customers and others to do something.*)

**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.*)

**Low Social Comfort:** In your previous jobs, were you required to work with the general public? Have you had any other experience at work or at school in being social with strangers or casual acquaintances? What do you like and dislike about these situations? (*Listen for an interest in and an ability to interact with people in casual encounters.*)

***Low Dependability:*** When would it be appropriate to leave a task undone and when would it not? Please provide specific examples from your current (or most recent) job. (Listen for a tendency to put things off, especially difficult or unpopular tasks.)

***Low Resilience:*** Please provide a specific example of a stressful work situation. What did you do? How did you handle it? How does stress on the job affect you? (Listen for responses that suggest a tendency to be easily affected by the ups and downs of the job or by personal circumstances.)

***Low Comfort with Objective Performance Criteria:*** Tell me how your performance has been measured or evaluated in past jobs. Did you receive a performance appraisal from your supervisor? How do you feel about being measured or rated? Were your ratings fair? (Listen for a comfort or resistance to being evaluated against a performance standard.)

#### **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 make it for you.

SELECT for Banking Sales Associates **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
<b>Review Application</b>	Not Acceptable	Some Reservations	Consider Further	
<b>Prescreen (Optional)</b>	Not Acceptable	Some Reservations	Consider Further	
<b>Test Candidate &amp; Review the Test Results</b>	Not Acceptable	Some Reservations	Consider Further	
<b>Behavioral Interview</b>	Not Acceptable	Some Reservations	Acceptable	
<b>Reference Checks (Optional)</b>	Not Acceptable	Some Reservations	Acceptable	
<b>Background Check (Optional)</b>	Not Acceptable	Some Reservations	Acceptable	
<b>Decide</b>	Do Not Make Offer	Eligible At Later Date	Make Offer	
<b>Drug/Medical Screen (Optional)</b>	Fail		Pass	