

Predictive Index



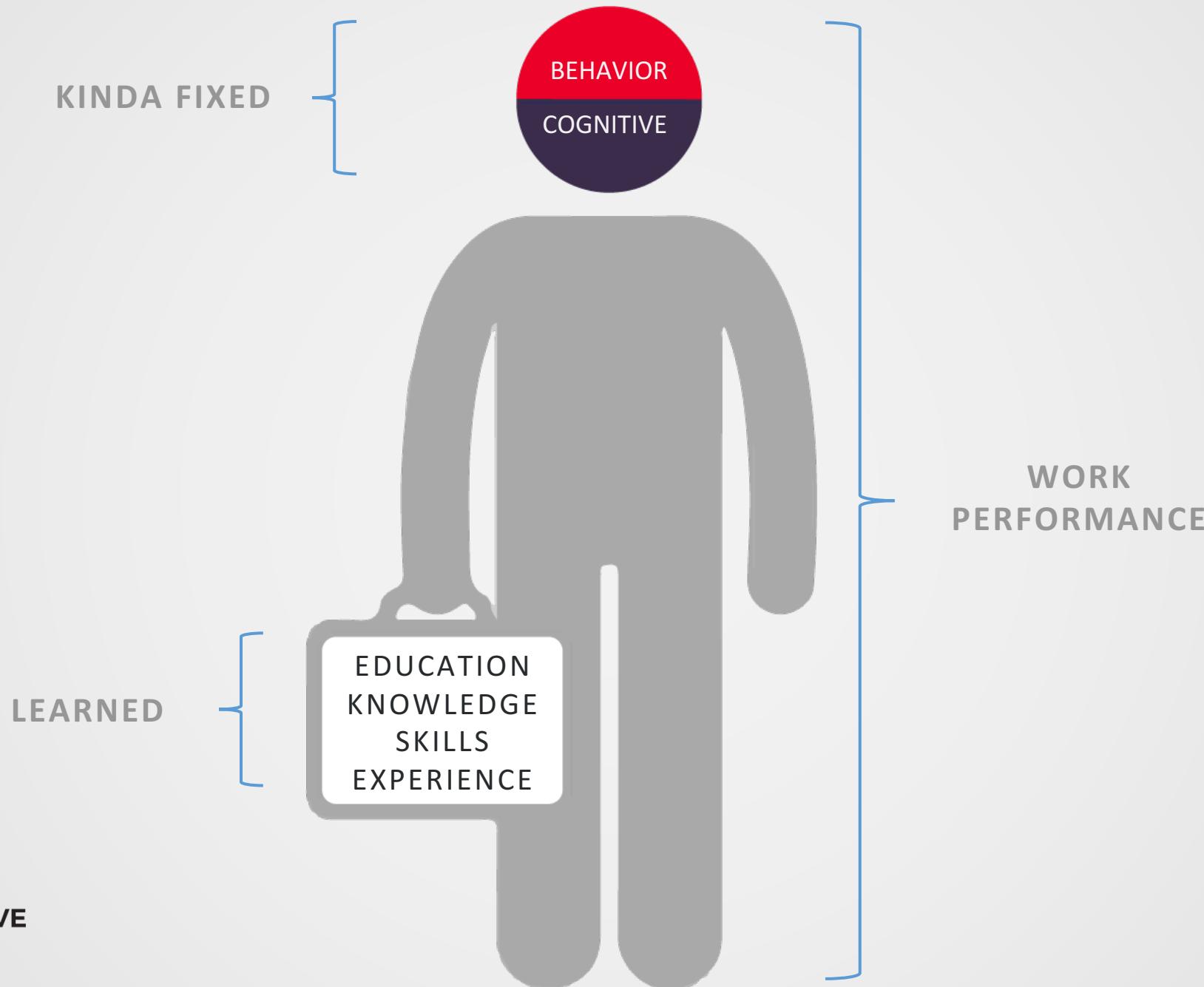
THE
PREDICTIVE
INDEX



PRESENTED BY
David Lunken

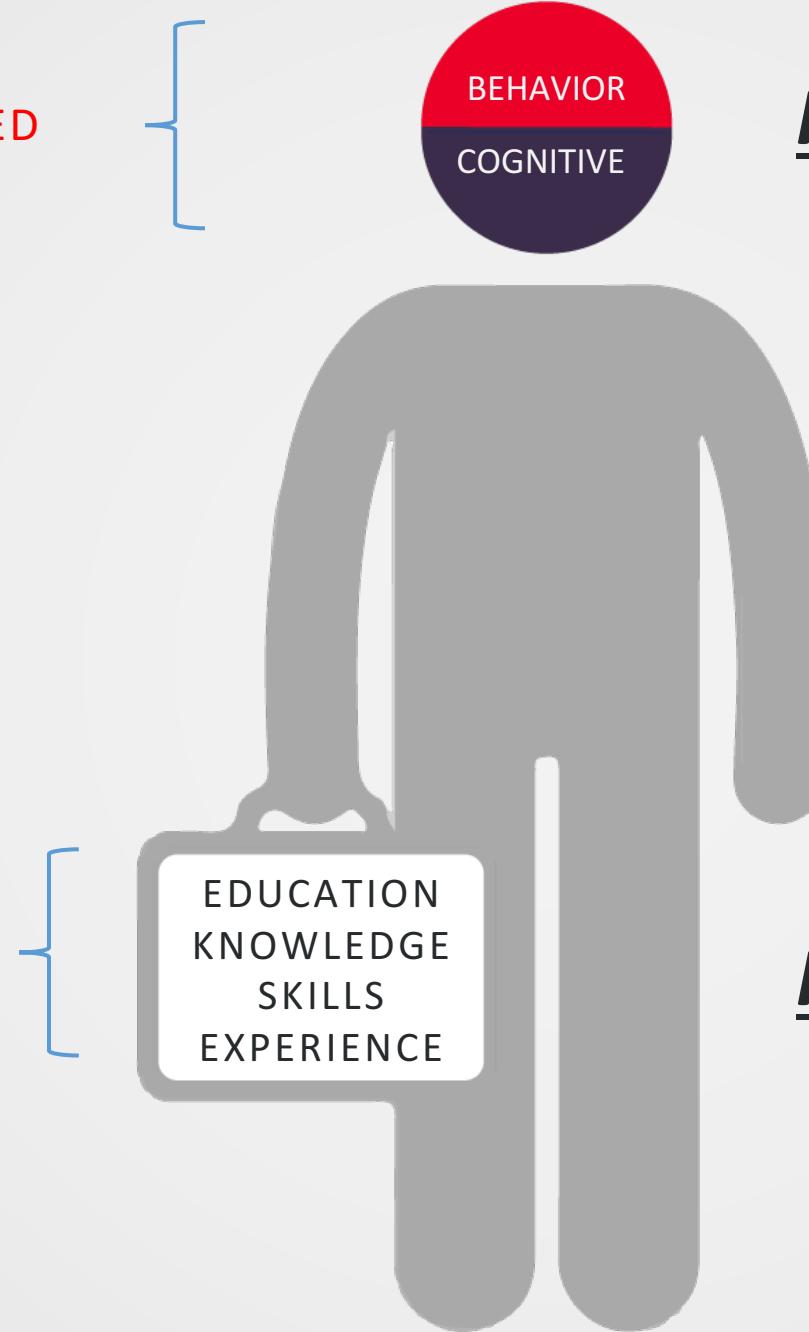
**Who's better
suited for
the job?**





THE FOCUS OF
RESUMES &
INTERVIEWS

TOOLS NEEDED



Fired for who you are

Hired for what you know

The Predictive Index Behavioral Assessment

- Measures work related behaviors
- Motivating needs and drives of an individual
- All people have these drives
- Specific combinations predict how a person is most likely to behave
 - Communication
 - Decision Making
 - Delegation
 - Risk

The Predictive Index Job Assessment

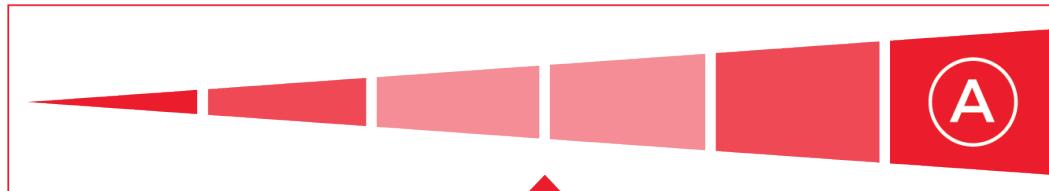
- Competency model for a role
- Define the behaviors that are Critical and Frequent for success
- Develop a target for a role
- Identify needs for style of:
 - Communication
 - Decision Making
 - Delegation
 - Risk

The Predictive Cognitive Assessment™

- Measures an individual's capacity to learn, adapt, and grasp new concepts in the workplace.
- Identifies individuals who will catch on quickly, figure things out on their own, and are able to meet or exceed performance expectations.
- 50 questions – 12 minute timed assessment
 - (Numerical, Abstract & Verbal questions)

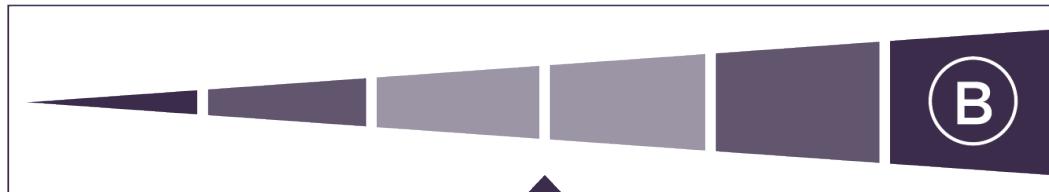
What Drives Does PI Measure?

Dominance



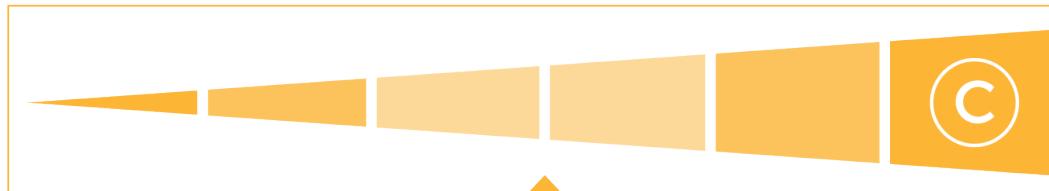
Dominance: The drive to exert one's influence on people or events

Extraversion



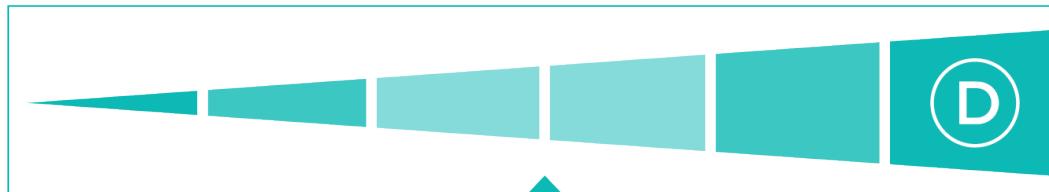
Extraversion: The drive for social interaction with other people

Patience



Patience: The drive for consistency and stability

Formality



Formality: The drive to conform to rules and structure

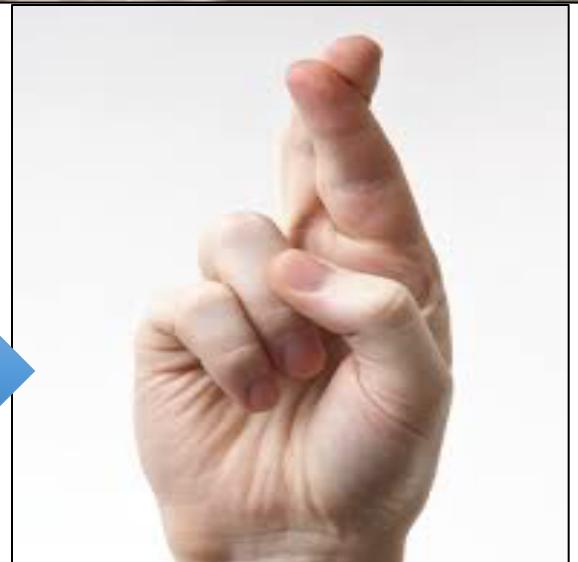
PI & Key Hire Project

EXAMPLE – FACILITIES AND OPERATIONS DIR.

Recruiting - Typical Process

Job Description

- Task
- Task
- Task
- Task



A Better Process: Define the Job – Goals for the Role

Key Result Areas

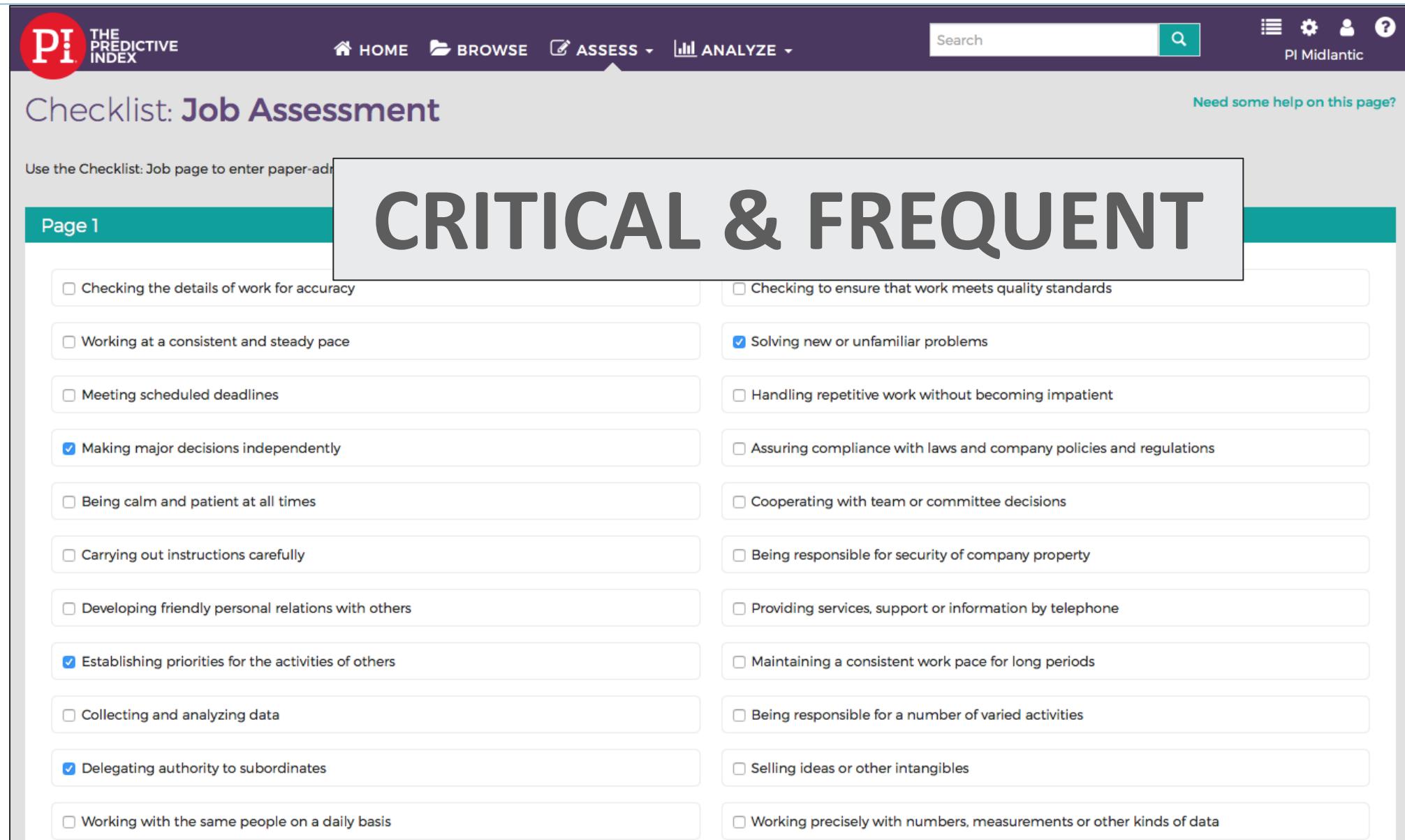
What are the top 3 things you actually want this person to deliver in this role?

Outcomes & Results

Not Tasks:

- communication, initiative, attention to detail, follow through, follow up, helpful

Engage Stakeholders/Search Committee



The screenshot shows the 'Checklist: Job Assessment' page from The Predictive Index website. The page has a dark purple header with the PI logo, 'THE PREDICTIVE INDEX', and navigation links for 'HOME', 'BROWSE', 'ASSESS', 'ANALYZE', 'Search', and 'PI Midatlantic'. A teal bar on the left says 'Page 1'. The main title 'CRITICAL & FREQUENT' is displayed in large, bold, dark gray letters. Below the title is a list of 20 job activities, each with a checkbox. The activities are arranged in two columns. Some checkboxes are checked (blue), while others are empty (gray).

Checklist: Job Assessment

Use the Checklist: Job page to enter paper-administered checklists.

Page 1

CRITICAL & FREQUENT

<input type="checkbox"/> Checking the details of work for accuracy	<input type="checkbox"/> Checking to ensure that work meets quality standards
<input type="checkbox"/> Working at a consistent and steady pace	<input checked="" type="checkbox"/> Solving new or unfamiliar problems
<input type="checkbox"/> Meeting scheduled deadlines	<input type="checkbox"/> Handling repetitive work without becoming impatient
<input checked="" type="checkbox"/> Making major decisions independently	<input type="checkbox"/> Assuring compliance with laws and company policies and regulations
<input type="checkbox"/> Being calm and patient at all times	<input type="checkbox"/> Cooperating with team or committee decisions
<input type="checkbox"/> Carrying out instructions carefully	<input type="checkbox"/> Being responsible for security of company property
<input type="checkbox"/> Developing friendly personal relations with others	<input type="checkbox"/> Providing services, support or information by telephone
<input checked="" type="checkbox"/> Establishing priorities for the activities of others	<input type="checkbox"/> Maintaining a consistent work pace for long periods
<input type="checkbox"/> Collecting and analyzing data	<input type="checkbox"/> Being responsible for a number of varied activities
<input checked="" type="checkbox"/> Delegating authority to subordinates	<input type="checkbox"/> Selling ideas or other intangibles
<input type="checkbox"/> Working with the same people on a daily basis	<input type="checkbox"/> Working precisely with numbers, measurements or other kinds of data

Gain Alignment Through Job Analysis

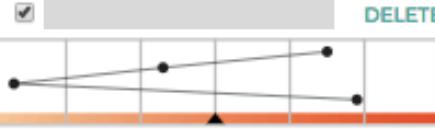
Job Pattern:

- Facilities

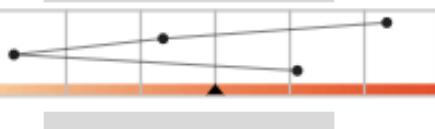
Select Contributing Job Assessments

Administered by Me (5) | All (5)

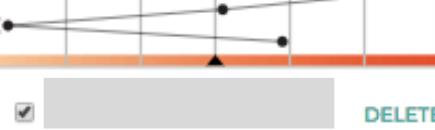
DELETE



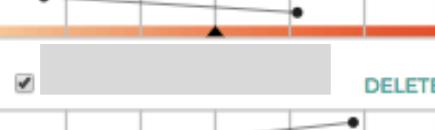
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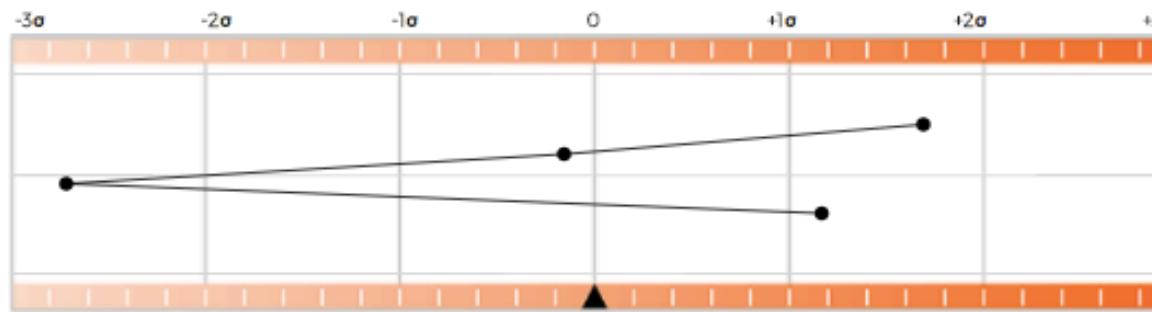


Review & Adjust Job Pattern

[BACK TO POSITION DETAILS](#)

Let's make sure your team is aligned on who you want to hire. Check out our best practices on how to [Gain Agreement on a Job Pattern](#) in Catalyst.

After selecting the Contributing Job Assessments, the Job Pattern below is the mathematical average of those assessment results. It is strongly recommended that you adjust the Job Pattern with the team making the hire. You can drag and drop the points on the graph or use the Adjust Factors buttons below. Make sure to keep in mind the Factors, Factor Combinations, and overall width of the pattern.



ADJUST FACTORS

A - Dominance



B - Extraversion



C - Patience



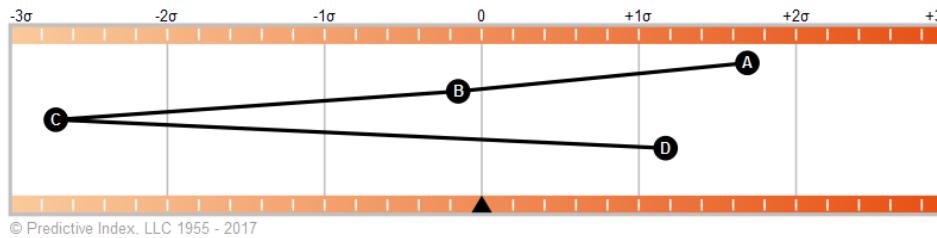
RESET FACTORS

D - Formality



OPTIONS

TARGET PROFILE – Facility & Operations Director



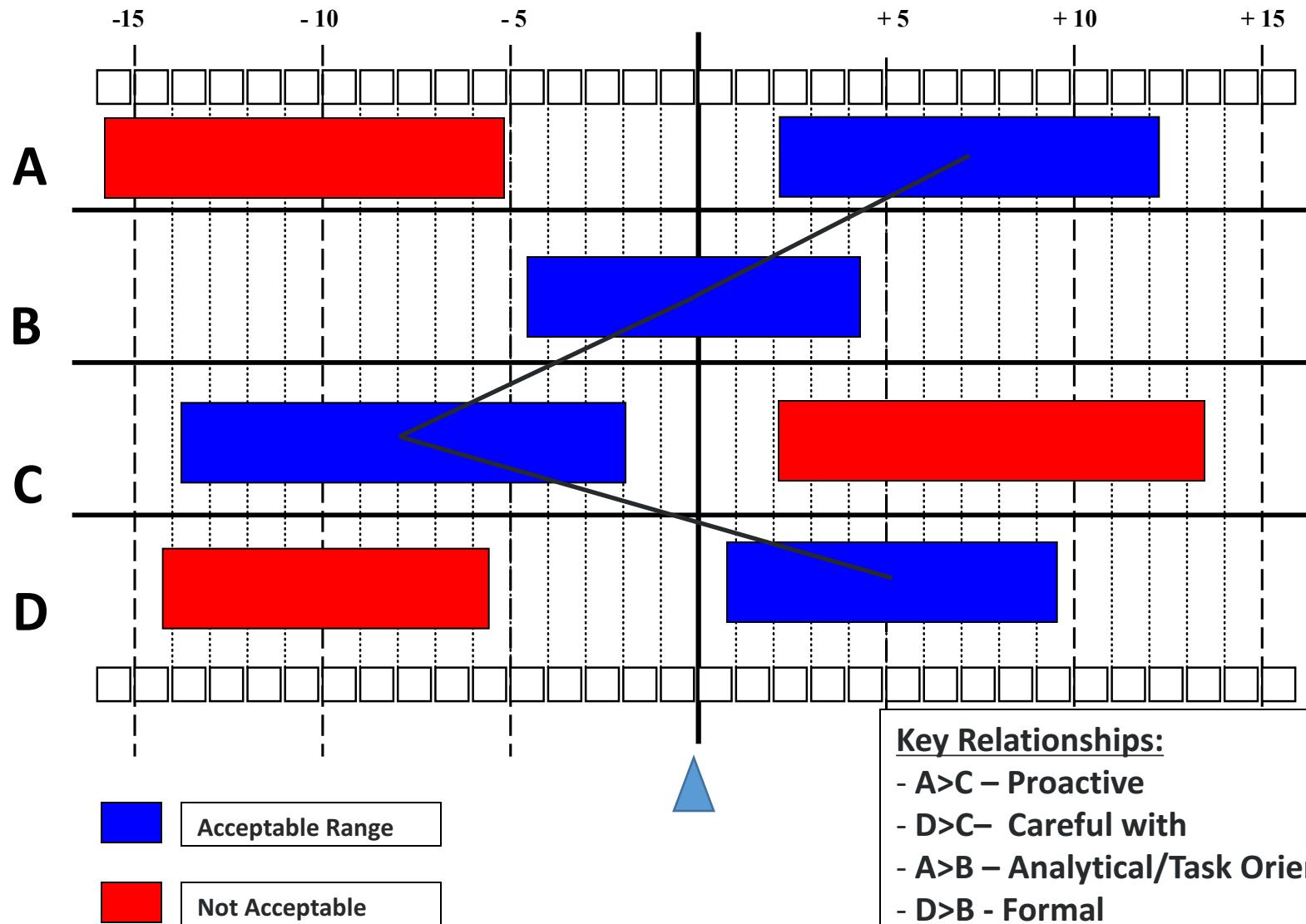
•This job requires strong analytical and technical abilities and demands fast, but carefully thought-out results. Strong leadership and control of the work process from beginning to end is necessary. The job centers around developing new ideas, systems and technology, and also analyzing and improving on old ones. A high level of expertise is expected and the ability to spot and correct errors is important. Work must be done right and quickly, while always focusing on accomplishing the goal and demanding the highest quality work from co-workers and subordinates. Interest and energy focuses primarily on the work at hand, with negligible inclination for small talk or social involvement. The broad scope of the job demands a factual, direct and authoritative style of communication. Decision-making, though swift, is very calculated and singular, with little reliance on consensus or collaborating opinions.

Below are the salient job characteristics, summarized and categorized. For best success, find candidates who thrive in the environment described below.

- Pace and Variety of Activities - Fast-paced environment Leading and controlling multiple projects simultaneously
- Focus - A definite analytical and technical orientation rather than a social orientation High standards, high quality work is of utmost importance Structured, organized and efficient work expected of self and others
- Decision-Making - Big picture, strategic decisions, well thought out and analyzed, Calculated risk-taking, Need not solicit the collaboration of others
- Communication and Collaboration - Blunt, candid and to-the-point communication style Work will primarily be done singularly with little involvement from others Requires forceful expression of opinions and decisions
- Delegation and Leadership Style - Will find it hard to delegate to others; intense follow-up, Will be exacting and controlling of subordinates

PI Plotting Grid

Facilities & Operations Director



Screen Candidates – Narrow the Pool

- Review Resumes for
 - Experience
 - Skills etc....
- Phone Screen for
 - Basic communication
 - Responsiveness
 - Etc...



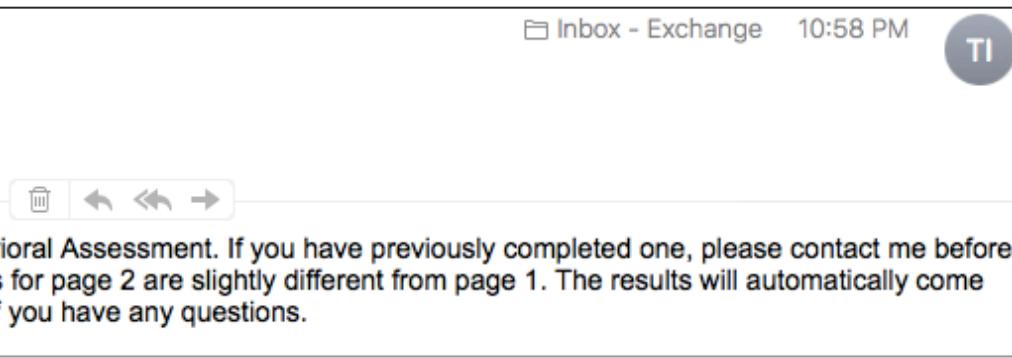
Administer the PI Behavioral Assessment

The Predictive Index

Predictive Index Behavioral Assessment

To: David Lunken.

Reply-To: David Lunken



David Lunken of PI MidAtlantic has arranged for you to complete The Predictive Index® Behavioral Assessment, a scientifically validated behavioral assessment. The Predictive Index®

Please note th

- Complete
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of PI MidAtlantic has arranged for you to complete The Predictive Index® Behavioral A

The Predictive Index®

Instructions Page 1 Page 2

DIRECTIONS: Please read the words in the list below and check those that you feel describe the way you are expected to act by others.

<input type="checkbox"/> Social	<input type="checkbox"/> Contemplative	<input type="checkbox"/> Engaging
<input type="checkbox"/> Neat	<input type="checkbox"/> Constant	<input type="checkbox"/> Firm
<input type="checkbox"/> Patient	<input type="checkbox"/> Understanding	<input type="checkbox"/> Responsive
<input type="checkbox"/> Reasonable	<input type="checkbox"/> Bold	<input type="checkbox"/> Careful
<input type="checkbox"/> Content	<input type="checkbox"/> Conventional	<input type="checkbox"/> Aware
<input type="checkbox"/> Persistent	<input type="checkbox"/> Charismatic	<input type="checkbox"/> Relentless
<input type="checkbox"/> Realistic	<input type="checkbox"/> Convincing	<input type="checkbox"/> Fascinating
<input type="checkbox"/> Relaxed	<input type="checkbox"/> Polished	<input type="checkbox"/> Rational
<input type="checkbox"/> Dominant	<input type="checkbox"/> Caring	<input type="checkbox"/> Gentle
<input type="checkbox"/> Analytical	<input type="checkbox"/> Formal	<input type="checkbox"/> Competitive
<input type="checkbox"/> Satisfied	<input type="checkbox"/> Loyal	<input type="checkbox"/> Organized
<input type="checkbox"/> Exciting	<input type="checkbox"/> Alert	<input type="checkbox"/> Lively

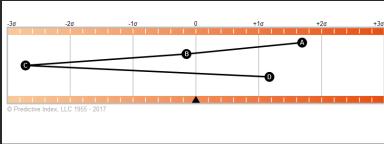
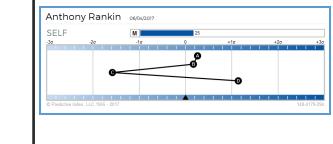
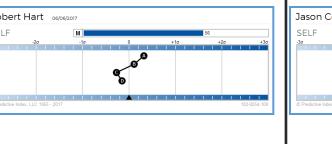
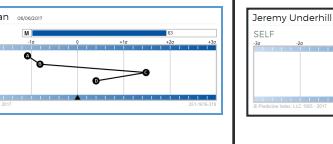
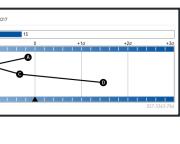
The Predictive Index®

Instructions Page 1 Page 2

DIRECTIONS: Continue by reading the words in the list below, now checking those that **you yourself believe really describe you**.

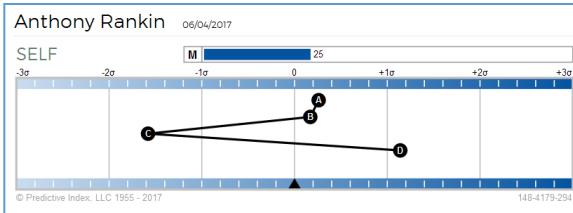
<input type="checkbox"/> Social	<input type="checkbox"/> Contemplative	<input type="checkbox"/> Engaging
<input type="checkbox"/> Neat	<input type="checkbox"/> Constant	<input type="checkbox"/> Firm
<input type="checkbox"/> Patient	<input type="checkbox"/> Understanding	<input type="checkbox"/> Responsive
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<input type="checkbox"/> Exciting	<input type="checkbox"/> Alert	<input type="checkbox"/> Lively

Candidate Compare – Fit/Gap Analysis

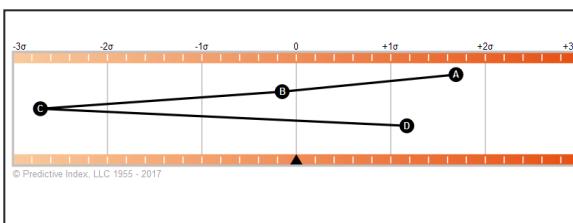
PRO Facility & Operations Director	Candidate A	Candidate B	Candidate C	Candidate D
				
A>C - Proactive	Yes	Yes	No	?
D>C - Careful with Rules	Yes	?	Yes	Yes
A>B – Analytical/Task Oriented	Yes	Yes	No	Yes
D>B – Formal	Yes	No	Yes	Yes
B>C – Quick to Connect	Yes	Yes	No	No

Yes	Fit – candidate matches the behavioral target. Confirm this.
?	Concern – candidate is in the target but we would like to see more. Is it enough, have they learned to overcome this.
No	Gap – candidate does not match the behavioral target. This is an area that needs a lot of probing and overwhelming evidence to overcome this gap.

A



PRO – Facility & Operations Director

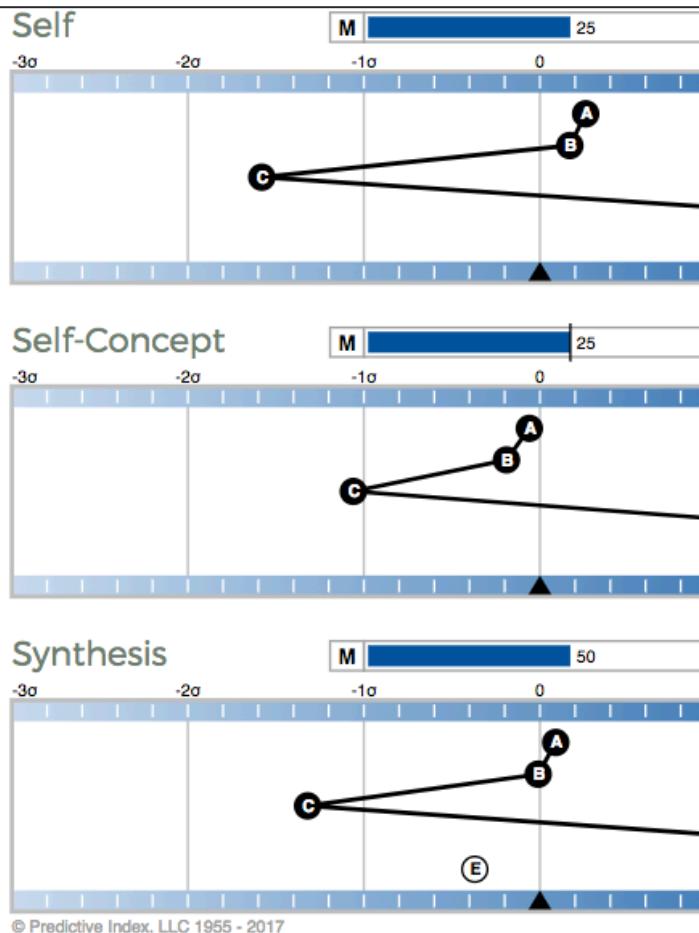


- Strengths
 - Careful, cautious, need to protect
 - Proactive, initiates to drive to get it right
 - Analytical problem solver
- Concerns
 - Empowerment – will he give up control of the details and work through others
 - Engagement – will he connect, build relationships, engage
 - Risk/Strategy – will he think strategically, change what needs to change

• Targeted Behavioral Interview Questions

- PRO calls for someone who is comfortable with risk. Give me an example of a decision you made that you would describe as a “risky” decision. What was the outcome? Would you do anything differently if you had that decision to make again?
- PRO calls for a flexible approach to “the book.” Tell me about a time when bending the rules or thinking “out of the box” really paid off for you.
- PRO calls for independence and self confidence. Describe a time when your opinion on an issue was very different from that of your supervisor/manager. What did you do? How did that turn out?
- PRO calls for someone who is competitive, seeks autonomy, and is results-focused. Tell me about a time when achieving the desired results for your team or company depended solely on your efforts.
- PRO calls for initiative and self-motivation. o Give me an example of a project/idea/process change, etc., that you initiated. What was it? What happened? Tell me about a time where you had to complete a project with very little direction

Candidate Behavioral Analysis



Strongest Behaviors

Anthony will most strongly express the following behaviors:

- Careful with rules: he's precise, by the book, fast-paced, and literal in interpreting
- Detail-oriented and thorough: he works to ensure things don't fall through the cracks
- Driven to achieve operational efficiencies: thinks about what needs to be done and the outcome. Impatient with routines.
- Proactivity in driving to reach his goals while moving at a faster-than-average pace
- Relatively independent in taking action on his own ideas. Resourcefully works around obstacles
- Eager for results, his drive is for swift implementation. He works best in fast-paced environments

Summary

Anthony is an intense, driving person with a strong concern for getting work done right and on time. Strongly motivated by his sense of responsibility, he will work rapidly within the framework of established company policies and procedures, referring to these standards for assurance of exactly how things should be done. While his primary focus is on the tasks at hand, he will give some energy to the people and relationships needed to finish.

Functioning within the structure of his defined responsibilities and duties, he will be a purposeful, conscientious self-starter, responding positively and actively to both technical and 'people' problems with the need to get things done in a timely fashion. Within the range of his training and experience, Anthony is a firmly decisive person able to make decisions quickly, to express and act on them with authority, and to share information about them. His decisions will be of a conservative nature, tending to avoid uncertainty and risk, and based on thorough knowledge of all pertinent information, including some input from experts and colleagues.

Working at a pace which is measurably faster-than-average, Anthony can learn quickly and thoroughly, adapting to new ideas and policies with caution and discretion. He has a strong critical sense, and because he respects recognized methods and policies, will need to see detailed evidence of the value of change or novelty before accepting it. While conservative, he's respectful of subject matter experts who express their ideas in a disciplined manner, and with proof to back them up.

As a communicator, Anthony is factual, direct, and authoritative, expressing himself with precision and, when he encounters delays or obstacles in work for which he is responsible, with impatience. Although conveying the purpose and information is his primary concern, he will have some focus on his audience, and can, at times, soften or adjust his style accordingly. He is uncomfortable with repetitive routines, and can handle such routines effectively only as long as they are an occasional aspect of his work.

Management Style

As a manager of people or projects, Anthony will be:

- Driven to ensure his team produces exceptionally high quality results in a timely fashion – no exceptions
- Authoritative, fast moving, and decisive when working within his field of expertise and realm of his defined responsibilities; he will ensure his team is driven to uphold these same standards for quality and timeliness
- Motivated to control and minimize risk by ensuring that his team understands the parameters for success, has a template for validation, and is always thoroughly trained and knowledgeable
- Cautious in delegation; when he does delegate, his follow-up will be quick and meticulous ensuring that all procedures have been followed and all standards met
- Formal and organized in his approach and communication; he presents information to his team and to others in a logical, organized, and well-thought-out manner

Influencing Style

As an influencer, Anthony will be:

- Authoritative and assertive when representing ideas or concepts where he has expert knowledge
- Eager to thoroughly understand any idea or concept before bringing it before others; prefers book knowledge and facts to thinking on his feet or 'winging it'
- Focused on the technical aspects of other's business so he can understand how his idea or concept will solve problems
- Vigilant about implementation details and how they will affect the process; he will act only what he knows he can deliver
- Better at influencing others about tangibles with which he is intimately familiar and perceives himself as an expert than with more abstract concepts or ideas
- Eager to discuss proven successes with his ideas and solutions as solid proof of reliability and integrity.

Management Strategies

To maximize his effectiveness, productivity, and job satisfaction, consider providing Anthony with the following:

- Opportunity to learn his job thoroughly, with a clear, specific definition of his responsibilities and clearly and consistently expressed company policies
- Work that affords variety and a fast pace within the range of his expertise
- Some interaction and collaboration with other people, particularly when they're subject-matter experts who speak with proof and authority
- Responsibility and opportunities to express his initiative and competence, with achievement rewarded by company recognition of his ability, and gradual broadening of his responsibility.

Create an Interview Guide

Joe Example 

Unknown - Sales Agent

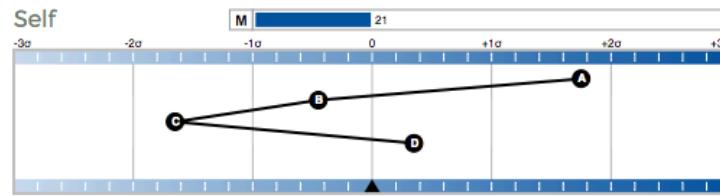
Assessments

Behavioral Assessment: 9/29/2017

RESULTS

Self Only | Full Results

Self



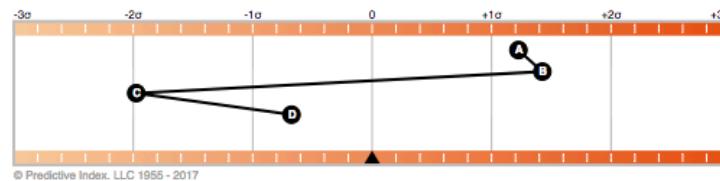
Factors

A - Dominance | B - Extraversion | C - Patience | D - Formality | Factor Combinations

Learn more about the [Four Factors](#) on Catalyst!

Person Summary

ASSOCIATED POSITION: Sales Agent



Need some help on this page?

Select an Action...

Analyze: Interview Guide

Need some help on this page?

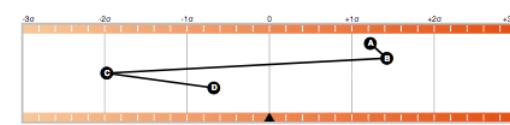
Guides

Joe Example

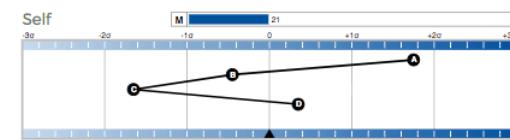


EDIT CONFIGURATION

Sales Agent



Joe Example



Factors Comparison

Match 	A	B	C	D
Match 	✓	?	✓	?

Interview Questions

(A) DOMINANCE ✓

Describe a situation when you were asked to deliver a tangible result.

Tell me about a time when you initiated something new.

(B) EXTRAVERSION ?

Tell me about a situation when you were required to quickly establish rapport with other people.

Describe a time when you had to influence the thinking of another person.

Communication - Describe your strengths and weaknesses as a communicator. Provide examples. In terms of communication with others at work, what types of communication are more difficult? Provide examples. Have you done anything to improve your communication skills?

Persuasiveness - Describe a time when you had to convince others to make a change or accept a viewpoint. How did you go about convincing them? Have you ever had to motivate teammates to achieve a goal? How did you go about doing that?

Networking - Describe an experience you've had building or maintaining a network of people outside of formal work groups. Was that network useful to you? In what way? Have you ever had an assignment in which you had to meet a variety of people and connect with them, at least on a superficial level, quickly? Tell me about the technique(s) you used to do that.

Persuasiveness - What is your approach to pitching an idea to your boss or another decision maker?

(C) PATIENCE ✓

Describe an experience when you were required to complete a project under a

A Better Process

Define the Job

Key Result Areas

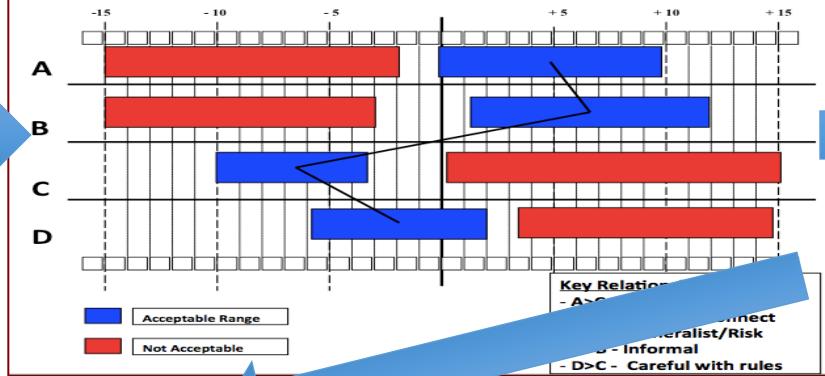
- Outcome
- Outcome
- Outcome

Sales Agent

- Sell new
- Retain + Grow
- Sell deliverable products

Create a Target

Position: Sales Agent



Attract Candidates

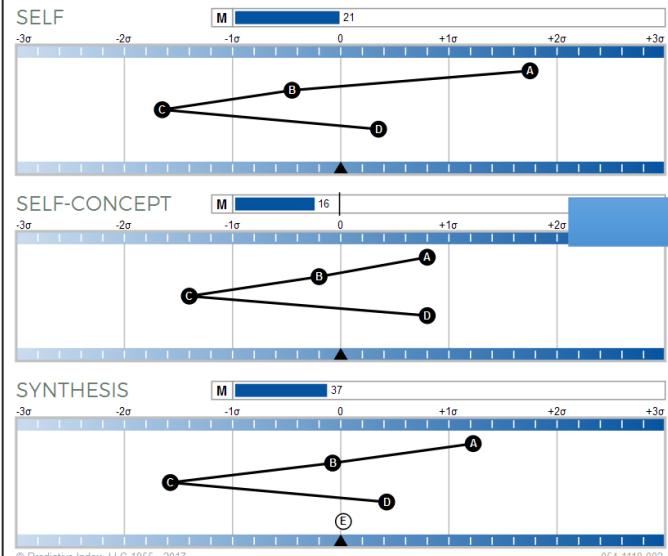


PI Midlantic

Suggested Elements for Job Ads

Suggested Phrases	Ad Style
Growing Firm – opportunity for advancement Independence – “BE your own boss”, “Grow a department” Competitive Challenge Performance based incentives – High potential \$ Personal Growth “Your success depends on you”	PUNCHY AGGRESSIVE CHALLENGING
Established, stable firm Excellent benefits Firm values high standards Firm rewards loyalty, quality Pride in excellence Extensive training opportunities Opportunity to use Skills	SPECIFIC FACTUAL

Administer PI



Compare PI BA v JA

PRO/Job Assessment Sales Agent	Candidate 1 Joe	Candidate 2 Amine
SELF-CONCEPT		
FC 1 - A>C - Proactive	Yes	Yes
FC 2 - A>D – Comfortable w/Risk	Yes	Yes
FC 3 - B>C - Quick to Connect	?	?
FC 4 - B>D - Informal	No	No
Cognitive -	pending	pending

Targeted Interview



PI – Key Hire Project

- Goal – Hire the right person for the role; best fit
- Define the Role - key result areas
- Create the Job PROfile – behavioral target
- Assess the Candidates (up to 10) – behavioral and cognitive
- Analyze, Prioritize and Interview Candidates
- Project Fee - \$1,600 (special PAISBOA rate)

Team Effectiveness Workshop

- Goal – Create understanding and leverage team members' strengths
- Administer Predictive Index survey for all team members
- 3-hour facilitated workshop – focus on team dynamics, communication, behavioral strengths and motivating needs
- Team Audit + review with team leader
- Follow up 30 days after session
- Project Fee - \$3,500 (special PAISBOA rate)



Predictive Index Program

- Unlimited Use
- Managers Trained in PI – 2 day and 1 day options
- Ongoing Consultative Relationship
- Easily Administered
- Valid and Legally Defensible
- 70 Languages
- Fees vary based on organization size



THE PREDICTIVE INDEX

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