PSA

Profiles Sales Assessment™
User's Guide

Profiles **International**

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Introduction

The Profiles Sales Assessment™ (PSA) is an assessment battery composed of three sections: Thinking Style, Behavioral Traits, and Interests. The various reports are used to assist business persons in placing, understanding, developing, and effectively managing employees in sales-related positions.

This User's Guide introduces the PSA and how to use it effectively in your organization. For a complete description of each PSA scale please consult the *PSA Quick Reference Guide*.

At the heart of the PSA is the Performance Model built for each sales position. All applicants and employees may be compared with the appropriate Performance Model(s) to identify critical areas to consider when placing and working with that individual. An applicant's match to the model will yield interview questions specific to the individual and the position under consideration. In addition, an Interview Guide for the Total Person will provide questions to advise the supervisor how best to help the employee adapt effectively to the job where necessary.

Please remember that as you use the PSA, and questions arise, support is available to you from your Profiles International, Inc. representative.

Understanding & Using the Profiles Sales Assessment™

In the business world, where it is so easy to duplicate products and undercut prices, the key strategic advantage for most companies is the performance of their employees. Employees who are well matched to their positions have higher attendance records, less turnover, higher job satisfaction, and superior job performance. Both the employee and the employer share the benefits of enhanced person to job fit.

As part of the Profiles International, Inc. line of products for employers, the Profiles Sales Assessment™ is designed to facilitate achieving the best possible job fit. Our clients use the PSA to develop effective sales teams and design optimal training programs based on the trainees' style of learning. They also use it to help supervisors determine which approach will work best when working with a particular employee and to help develop succession plans.

The PSA is a psychometric instrument with roots extending over the past 30 years. More than 600,000 job applicants and incumbents have participated in its development. These sample groups represent a diverse cross section of ages, ethnic groups, income levels, education levels, job titles, companies, and

industries. The PSA is the product of collaboration between several test development psychologists and specialists coordinated by Profiles International, Inc.

Profiles Sales Assessment™ investigates three key areas (Thinking Style, Interests, and Behavioral Traits) as a part of evaluating how an individual fits into a particular job. All of the areas, however, are not always required to differentiate between those who will do well in a position and those who may be overly challenged by the same position. All three areas may be important for some Performance Models, though only one or two may stand out for a given job match situation. By reviewing broad areas of Thinking Style, Interests, and Behavioral Traits, we expand our ability to discover which areas will be most effective in determining job fit for a given position.

The Profiles Sales Assessment™ Sections

Listed below are brief descriptions of the three key sections of the Profiles Sales Assessment™. A comprehensive, detailed description of each scale is available in the *PSA Quick Reference Guide*.

Thinking Style Scales

A primary resource for learning is the ability to process information coming from the environment. In most training situations this information is in the form of either words or numbers. Each of the four Thinking Style sub-sections measures an aspect of understanding words or numbers and using each as a part of the reasoning process. They form the foundation for problem-solving, communication, interaction, and learning skills used on the job.

The Learning Index score in the Thinking Style section is a composite of the four sub-sections, Verbal Skill, Verbal Reasoning, Numerical Ability, and Numeric Reasoning. It is an index of expected learning, reasoning, and problem handling ability. Typically, the more easily individuals process information, the greater the pace at which they may learn those skills used on the job. Often, maximizing learning means finding the approach that will make the most of the individual's learning skills.

Interests Scales

It has been determined there are six interest areas which are effective in predicting an individual's motivation and how satisfied they would be in various job positions. Each interest area defines a category of characteristics that identify the unique aspects of work environments. The theories of Dr. John L.

Holland were an essential guide for the development and interpretation of these occupational Interests themes.

Behavioral Traits Scales

Behavioral Traits help define who we are by influencing our behaviors. As our strengths and the combinations of our behavioral traits vary, so do our behaviors. The Profiles Sales Assessment™ assesses some of the traits which have been shown to be important in sales-related work settings.

>   **Critical Sales Behaviors** – combinations of the Behavioral Traits scales result in seven Critical Sales Behaviors. These behaviors are specific to sales situations and are reported separately in the Performance Model Comparison Report. The Critical Sales Behaviors do not impact an individual's fit to a Performance Model.

Distortion Scale

The Distortion scale evaluates the consistency of the individual's responses on the assessment. Too many inconsistent or statistically unusual responses can lead to an unacceptable rating and raise concern that the results may have been distorted and may not be truly representative of the individual.

The Distortion scale refers to the reliability of the results, not the honesty of the person. Unacceptable distortion results can reflect several possible situations. Some examples include, a difficulty reading the questions, an attempt to portray a picture of how they would like to be seen rather than an accurate picture of who they are, or a very casual and inconsistent approach to answering the questions. Any, or all, of these situations could affect the individual's distortion results. The Distortion scale should not be used as a basis for disqualifying an individual.

Should the distortion results fail to meet the guidelines the following cautionary statement will appear on the report:

>   *"The Distortion scale for this assessment suggests the results may not be useful in making a decision. Please consult the User's Guide for this product for further guidance."*

Should this cautionary statement appear in a report, it indicates the individual answered with an unusual pattern of responses. This tells you that the report may not reflect an accurate view of the individual. You should keep this in mind as you interview the candidate for a position.

Reading the Profiles Sales Assessment™ Reports

The Profiles Sales Assessment™ reports are presented clearly and require no interpretation beyond the printed reports. The use of business language helps provide a clear understanding for the reader and is designed to describe the individual in a positive manner.

All reports present the results in graphic and narrative form. When a Performance Model is utilized, the individual scores are presented as they relate to that Performance Model.

The score for each scale is reported on a STEN scale with one at the low end and ten at the high end. The PSA is normed on the working population so the scores will fall on each scale with a normal distribution. In other words, on each scale, about two-thirds of the scores will be 4, 5, 6, or 7 and as you move toward either end of the scale, the frequency of scores will taper off.

The percentage match for each of the three sections indicates how well you can expect the individual to fit into the job in question. The overall job match percent reflects the cumulative scores for all three of the subsections and the degree to which the individual fits the Performance Model.

Your Profiles International, Inc. representative is an outstanding resource to help you utilize the reports effectively.

The Profiles Sales Assessment Reports™

A.   The **Performance Model Comparison** is typically used to identify how well a person will fit into a given position.

B.   The **Interview Guide – Challenge Areas** provides questions designed to assist the interviewer when the candidate scores outside the Performance Model.

C.   The **Interview Guide – Total Person** provides questions developed to guide the interviewer when the individual scores within the Performance Model as well as outside the model.

D. The **Strategic Workforce Planning** report allows matching one individual to several Performance Models in a single report. This helps facilitate a better understanding of where the best job fit may be expected and is often used in succession planning for the individual.

E. The **Candidate Matching** report shows the results of comparing several candidates to an established Performance Model. The given percentage score indicates how well each candidate matches the established model.

F. The **Individual Profile** may be shared with the individual who took the assessment. This report does not provide the actual scores for each separate scale but instead includes a description of what the individual's scores suggest. There are no references to any specific Performance Model.

G. The **Comparison Summary** is used to take a quick look at how well an individual fits into a particular Performance Model. It compares the individual scores against the model and provides a brief statement describing the meaning of each scale.

H. The **Summary Graph** is a single page summary with the graph from the Comparison Summary report. The graph provides the individual's scores matched to a selected Performance Model.

I. The **Individual Graph** provides the graph of an individual's scores without reference to any Performance Model. A brief description of each scale is also provided.

J. The **Performance Model Analysis** may be produced for any established Performance Model. The report includes a Performance Model Graph and a Performance Model Description which describes the type of individual who would be most effective in that position.

K. The **Performance Model Graph** is a single page summary that provides the preferred scores for a selected Performance Model.

L. The **Performance Model Description** is a summary graph with scale descriptions for the type of person who would fit best in the desired position.

M.   The **Concurrent Performance Model Overview** is a graph which indicates where a selected group of candidates score on an established Performance Model. This provides an overview of where the model may need refinement.

The Performance Models

The Performance Model process represents an effective approach that minimizes the time required to efficiently describe jobs, people, and good matches. Once you have identified what is necessary for success in a position, you can build a Performance Model for each factor. The model consists of a range for each scale where the scores of the most effective performers tend to fall. The farther outside this range (model) a score falls, the less likely there will be a good fit of the individual to the job. The results are presented as a percent match to a specific Performance Model.

By using a Performance Model, it is easy to quickly identify when individuals fit well in job positions and when they may have to make adjustments. This information is important for job placement, job training and allows for the identification and presentation of specific interview questions for applicants and coaching comments for incumbents.

We have been asked, "Can we use small samples to build models, or do we need very large samples?" The answer is, in the real world you use what you have available. While it would be great to have large numbers of workers representing each level of competency within each job that is not always possible. Even a small sample will give you a good place to start the process and allows you to further refine the model with ongoing evaluation.

Once a Performance Model is developed and placed into use, it is appropriate to continue to improve/modify the model as more empirical data become available. Each Performance Model is reviewed in light of the most recent data on a regular basis. As the composition of the top performers is reviewed and adjusted, the Performance Model may be adjusted accordingly. It is important for a business to continually maintain the job relevance of the process by which employees are placed.

Using Performance Models

Once a good Performance Model has been created it may be used to match that job position to anyone who has taken the Profiles Sales Assessment™. The Performance Model is composed of a range of

scores for each scale. The farther outside this range (model) a score falls, the less likely there will be a good fit for the individual to the job concerning that particular factor. As mentioned earlier, job match is reported as a percent match to a specific model.

The range of reported job matches will be from 25% to 95%. A percentage match will be provided for each of the three sections, Thinking Style, Interests, and Behavioral Traits and also for the overall match. The higher the match percent reported, the higher the expectancy the individual will fit well into the job under consideration.

While this Performance Model approach to matching individuals to a job provides information of great value and should be a major part of people decisions, when placing personnel, the results from any assessment should never make up more than one-third of the final decision. This is especially true when accurate job performance information is available for existing employees.

Methods for Building Performance Models

There are three primary sources of data that may be used to build a Performance Model for a specific position. Some may be used alone, but all may be used in combination. The objective is to use the best information available to provide the best model for matching.

The sources of data include building a new Performance Model for the position, using an existing Performance Model from the PSA Preliminary Model Library built for a very similar position, or by completing a Job Analysis Survey. Your Performance Model may be established using one of the following approaches:

A. **Concurrent Study** – this approach is used when the PSA results for three or more top performers are available. When utilizing the software, use the Performance Model submenu to select the names of the top performers. The computer will then build a new model from that information; this should be carefully reviewed and fine tuned to fit your situation.

B. **Existing Performance Models** – the PSA may be used with models available from our Web site's Preliminary Model Library or with a model transferred from another office and verified to apply to your work setting. Once built, a Performance Model may be edited manually.

C. **Combination of data sources**

- A Concurrent Study may be combined with an Existing Performance Model to build a new model.
- A Concurrent Study may be combined with the results from a Job Analysis Survey completed by a person, or persons, very familiar with what the job requires.
- An existing Performance Model may be combined with the results from a Job Analysis Survey to create a new model.
- A Concurrent Study, existing Performance Model and a Job Analysis Survey may all be combined to create a new model.

The **Job Analysis Survey** (JAS) consists of 57 questions that identify activities identified as important for success on the job. A Job Analysis Survey is to be completed by one or more individuals who supervise the job position and who are very familiar with what is required to perform successfully in that position. Once completed, the JAS is entered into the software so it may be combined with input from other sources (e.g., existing models, concurrent studies or both) to build a new model. One or more Job Analysis Surveys may be used in this process.

Administering the Profiles Sales Assessment™ Face-to-Face

The following information will help you use Profiles Sales Assessment™ effectively. Follow these basic steps when working directly with candidates and administering the PSA.

1. Read this entire guide before using the PSA assessment.
2. Assess all candidates under similar conditions.
3. Provide candidates with a comfortable testing area that is quiet, well lit, and free from distractions.
4. Candidates should be prepared for the assessment (wearing glasses, if required, etc.) and feeling well, not overly tired, or under unusual stress.
5. Candidates should be able to read at the 6th grade level or higher.
6. Ask whether they have special requirements or need assistance to complete the assessment.
7. This assessment should take approximately 60 minutes. However, there is no time limit imposed.

8. If a candidate requests a copy of their Individual Profile, it is suggested you require the request be made in writing. Upon receipt of the written request make a copy of the person's report and arrange for its delivery. You should consult your organization's policies before sharing any results with the candidate.

Administering the Profiles Sales Assessment™ Online

The Profiles Assessment Center is used to administer any of the Profiles assessment tools to candidates online. Please consult the Assessment Center Guide for information on scheduling and administering an assessment. Instructions are also provided for communicating with an individual who is to complete an assessment. This information can be found at http://www.profilesac.com. As always, if you have questions regarding this, or any of Profiles assessment tools, please contact your Profiles International representative.