



# CLIENT CASE STUDIES

VOLUME ONE

Profiles International  
imagine great people®



Partner Contact Information






**Client Case Studies - Vol. 1**

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**Acknowledgements**

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# Table of Contents

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## listed by industry

### Business Services

7 Using Assessments To Build a Workforce Equipped for the Company's Future

### Call Center

15 Mining the Full Value of an Assessment

### Data Services

23 Maximizing Employee Productivity

### Financial Services

27 Using Leadership Development to Reduce Turnover

35 Developing Successful Leaders with ProfileXT® and Step One Survey II®

43 Reducing Turnover & Increasing Productivity with ProfileXT® & Job Match Pattern

### For-Profit Education

49 Reducing Turnover with ProfileXT® & Job Match Pattern

### Insurance

53 Identifying Top Performers and Continuously Improving the Selection Process

### Human Resources Staffing

59 Reducing Turnover with Step One Survey II®

### Medical Device Distribution

63 Identifying Top-Performing Sales People

### Real Estate

67 Reducing Turnover: Taking Assessments to the Next Level

### Retail

73 Using the CheckPoint 360™ to Build Leadership & Embrace Growth

### Sales Organization

79 Hiring Productive Sales People

### Senior Healthcare

81 Recruitment, Coaching, & Retention with ProfileXT®, Step One Survey II®, & Customer Service Profile™



# Table of Contents

---

## listed by challenge

### Selection

- 7 Using Assessments To Build a Workforce Equipped for the Company's Future
- 53 Identifying Top Performers and Continuously Improving the Selection Process
- 63 Identifying Top-Performing Sales People
- 79 Hiring Productive Sales People

### Development

- 23 Maximizing Employee Productivity
- 35 Developing Successful Leaders with ProfileXT® and Step One Survey II®
- 73 Using the CheckPoint 360™ to Build Leadership & Embrace Growth
- 81 Recruitment, Coaching, & Retention with ProfileXT®, Step One Survey II®, & Customer Service Profile™

### Retention

- 15 Mining the Full Value of an Assessment
- 27 Using Leadership Development to Reduce Turnover
- 43 Reducing Turnover & Increasing Productivity with ProfileXT® & Job Match Pattern
- 49 Reducing Turnover with ProfileXT® & Job Match Pattern
- 59 Reducing Turnover with Step One Survey II®
- 67 Reducing Turnover: Taking Assessments to the Next Level





# CASE STUDY

USING ASSESSMENTS  
TO BUILD A WORKFORCE  
EQUIPPED FOR THE  
COMPANY'S FUTURE



Business Services

# ProfileXT<sup>®</sup>

## Using Assessments To Build a Workforce Equipped for the Company's Future



### AT A GLANCE

This company uses a federated learning model for its global network of trainers and employee development activities.

### Company overview

A leading global provider of innovative workplace solutions recently turned to assessments to change its hiring processes. The business services firm enables companies of all sizes to work wherever, whenever and however they deem necessary. The company's worldwide presence includes more than 1,000 business centers in 450 cities in 85 countries.

The company's product offerings include fully furnished, equipped and staffed offices – as well as world-class business support, conference and meeting rooms, and a large network of video-conference rooms. In addition, the organization supports mobile and home-based workers with such services as virtual offices, which provide dedicated business addresses, and mail and call-handling services. In airports and other commercial hubs, the organization's business centers exist to serve clients wherever they find themselves.

In 1989, the company's founder and CEO launched the firm after noticing how many businesspeople were struggling with makeshift work environments while traveling. Today, organizations of all sizes, including more than one-half of the FORTUNE 500, turn to this organization to reduce costs – and to remove the burden of property ownership and office management, while gaining cost-efficient access to customized operations and amenities.

The company is publicly traded on the London Stock Exchange and follows an aggressive growth strategy. Recent milestones include the 2004 acquisition of a leading business center operator in the United States. For the year ending December 31, 2009, the company's revenues exceeded £1 billion.

The learning and development (L&D) function at the organization includes a global network of trainers and employee-development efforts that run the gamut of topics from sales and operations to customer service and leadership development.

# CASE STUDY

USING ASSESSMENTS TO BUILD A  
WORKFORCE EQUIPPED FOR THE  
COMPANY'S FUTURE



## KEY TAKEAWAY

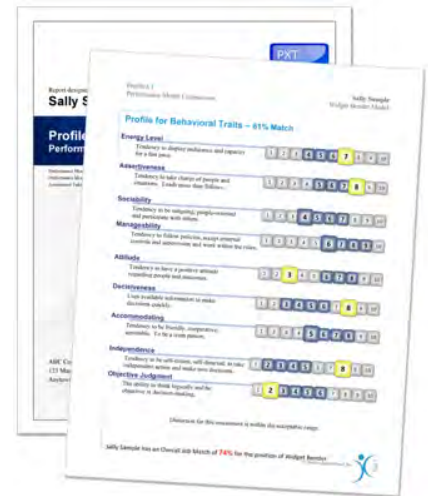
The PXT offers a framework for discussing how the set of desirable traits for a particular job might evolve over time.

Pre-hire assessments can also be valuable in terms of succession management and the continued development of employees at all levels.

## The company's assessment goals

The business services firm sought a relationship with Profiles International in 2008 to improve its hiring criteria and processes, and began using the ProfileXT®<sup>1</sup> tool in 2009. Specifically, ideal profiles were developed for the positions of area sales manager and center manager.

Some organizations view the PXT as a tool primarily for reducing employee turnover by ensuring a better initial job match. It is worth noting that, while turnover improvements were certainly welcome, the company's aim focused more on the future and ensuring employees' long-term value.



The company has experienced a growth spurt in recent years, and company leaders expect similar change in the years ahead. During times of growth, companies often place greater importance on consistency in their decision-making criteria and processes because standards must be communicated to more people in more dispersed locations. Leaders at the organization believe an assessment-guided approach to hiring is helping to ensure that consistency. Without it, hiring decisions might be based too much on incidental variables, such as the rapport between a particular candidate and interviewer.

Also, the PXT offers a framework for discussing how the set of desirable traits for a particular job might evolve over time. That could conceivably lead to different hiring choices than if a job description were expected to remain static.

Finally, assessments can be considered not only in terms of the job being sought today, but also in view of subsequent roles that an applicant might be suited for down the line. In that way, pre-hire assessments can also be valuable in terms of succession management and the continued development of employees at all levels.

<sup>1</sup> For more information, *Profiles International: A Multifaceted Approach for Assessing Talent*, Bersin & Associates / Kim Lamoureux, January 13, 2010. Available to research members at [www.bersin.com/library](http://www.bersin.com/library).



### BEST PRACTICE

This company implemented a two-month change management effort to reduce the natural fears that arise from assessments.

What we committed to, for our employees when they completed the assessments, was that we would use it as a development opportunity – a way that they could learn more about themselves, areas that they could get better at, as well as things they did very well that they may not have been aware of ... There was no hidden agenda. We were open. We were honest. We shared what we were doing.

## Change management

Development of ideal profiles at the organization required assessments of current employees in the positions of interest, with special attention to those viewed as top performers and those seen as being among the poorest performers. Leaders of the effort did not intend to force participation, but they knew poor participation could compromise results.

It is wise for organizations doing employee assessments to pause first and consider natural, fear-driven questions that might drive resistance. *Will the results be used against us? Will we be cast unfairly as liabilities to this company, losing opportunities for promotion or even being fired?*

The company opted not to let such concerns become an issue. For nearly two months, company leaders explained honestly to the targeted members of the workforce that assessments would be used to guide hiring, but that they would not be used in any way to weed out current employees from the organization. The success of this communication effort might be gauged by the fact that 110 people (about 90 percent of the targeted employees) did complete assessments. That provided plenty of information to create the two benchmark profiles – for the positions of area sales manager and center manager.

The company's global director of learning and development remarked, "What we committed to, for our employees when they completed the assessments, was that we would use it as a development opportunity – a way that they could learn more about themselves, areas that they could get better at, as well as things they did very well that they may not have been aware of ... There was no hidden agenda. We were open. We were honest. We shared what we were doing."

Assessment results have continued to guide employee-development efforts since the organization began using the PXT as part of its pre-hire screening process. Results may or may not be shared with individual subjects once hired, but managers routinely mine them for insights on how best to onboard a particular employee and then how best to manage performance. Also, the training team reviews the profiles before new team members attend onboarding training and use the information to work with individuals throughout the training.



# CASE STUDY

USING ASSESSMENTS TO BUILD A  
WORKFORCE EQUIPPED FOR THE  
COMPANY'S FUTURE

If we look at the profile that was created for the area sales manager role in Figure 1, we see 20 characteristics based on thinking style, behavioral traits and occupational interests. For each characteristic, individuals are scored against a range of ideal values to determine job fit.<sup>2</sup> Employees might fall under, within or above this range.

Figure 1: Job Match Pattern Ranges for Area Sales Managers

	Low Value	High Value
<b>Thinking Style</b>		
Learning Index	5	8
Verbal Skill	6	8
Verbal Reasoning	4	8
Numerical Ability	4	6
Numeric Reasoning	5	9
<b>Occupational Interests</b>		
Enterprising	8	10
Financial / Admin	6	8
People Service	7	9
Technical	5	7
Mechanical	1	3
Creative	4	6
<b>Behavioral Traits</b>		
Energy Level	7	9
Assertiveness	7	9
Sociability	6	9
Manageability	5	8
Attitude	3	5
Decisiveness	5	7
Accommodating	4	7
Independence	4	7
Objective Judgment	7	9

Source: Profiles International, 2010

<sup>2</sup> "Job fit" refers to the assessment of current knowledge, skills, competencies and other key qualifications of an individual against the requirements of a specific role (current or future).

# CASE STUDY

USING ASSESSMENTS TO BUILD A  
WORKFORCE EQUIPPED FOR THE  
COMPANY'S FUTURE

Figure 2 shows the percentages of the company's top and bottom performers who fall within the ranges that the new area-sales-manager profile recommends as ideal. You can see that a much lower percentage of bottom performers scored "within pattern." When employees score "below pattern," it simply means that they are not as good a "fit" for this role as those who score "within pattern." However, the selection of individuals is not based solely on this assessment. Some individuals may be selected even if they fall out of range on a handful of characteristics or traits.

The tool's primary benefit lies in the way it systematically draws managers' attention to areas where immediate employee development might be needed. Profiles International recommends weighting the assessment at 33 percent of the overall hiring criterion.

**Figure 2: Top and Bottom Performers against the Area Sales Manager Profile**

Thinking Style and Behavioral Traits Scales	Top Performers			Bottom Performers		
	Below Pattern	Within Pattern	Above Pattern	Below Pattern	Within Pattern	Above Pattern
Learning Index	0%	100%	0%	13%	75%	13%
Verbal Skill	13%	88%	0%	0%	75%	25%
Verbal Reasoning	0%	100%	0%	13%	88%	0%
Numerical Ability	0%	63%	38%	13%	50%	38%
Numeric Reasoning	13%	88%	0%	38%	50%	13%
Energy Level	25%	75%	0%	25%	63%	13%
Assertiveness	25%	75%	0%	63%	38%	0%
Sociability	0%	100%	0%	0%	63%	38%
Manageability	0%	100%	0%	13%	88%	0%
Attitude	0%	75%	25%	25%	0%	75%
Decisiveness	13%	75%	13%	38%	13%	50%
Accommodating	0%	100%	0%	50%	25%	25%
Independence	0%	75%	25%	0%	75%	25%
Objective Judgment	25%	75%	0%	88%	13%	0%

Source: Profiles International, 2010



### KEY TAKEAWAY

Revisions are made to job profiles periodically to strengthen the tool's accuracy in forecasting success on the job.

## Validating the profiles

Leaders recognized that the use of assessment tools and the makeup of ideal profiles must evolve to be effective. For that reason, assessment results are revisited periodically. These second looks help to strengthen the tool's accuracy in forecasting individual candidates' success on the job.

For example, leaders might recheck the assessment of a hire who went on to become a top performer. If assessment results are found to have aligned closely with the ideal profile, the profile's validity as a predictor of good performance grows. If, however, that top performer's assessment results deviated significantly from the ideal, there might be reason in hindsight to recalibrate the importance of certain traits.

Under the same premise, rechecking the assessment results of employees who leave the company can reveal that certain traits merit more attention as red flags. This has turned out to be the case with low assertiveness scores for sales candidates. The trait is now seen as more important than many others that are measured.

## Results

The financial impact of the company's new hiring processes is difficult to gauge because current challenges in the overall economy complicate numerical comparisons with the past. From a qualitative perspective, however, leaders at the organization feel their use of assessments has helped to keep hiring decisions grounded, compared with the impulse-based decision-making that hard times can sometimes breed.

For example, one regional vice president noted that during a past recession, leaders had convinced themselves that the company needed sales associates with higher salary requirements. Such additions to the sales force increased costs, but ultimately did not necessarily improve results. Through the more recent downturn, the business services firm has based hiring decisions more on candidates' compatibility with the company's selling style. Leaders feel the shift in emphasis has helped to reduce the time it takes for new sales team members to begin delivering consistent results. The faster ramp-up time for a sales team member is critically important to the organization and the team member.

# CASE STUDY

USING ASSESSMENTS TO BUILD A  
WORKFORCE EQUIPPED FOR THE  
COMPANY'S FUTURE



## KEY TAKEAWAY

Leaders at this company have found the PXT to be a great tool for helping to ensure that hiring decisions propel the organization toward its goal in a focused way.

## Next steps

The company plans to continuously improve all aspects of its assessment-guided hiring processes. Currently, for example, the company is adding a requirement that any manager who wants to make an external hire first receive mentoring from Profiles International on how to make the most of the PXT assessment tool.

Also, the organization is looking at ways to further pin down the meaning of specific scores on specific traits. While a theoretical percentage match with the overall profile offers valuable insights, leaders want to go deeper and understand, for instance, what different scores on a given characteristic might suggest about two applicants' future performance, comparatively.

Finally, the company wants to increase its use of assessments to guide employee onboarding and development, and for hiring from within the company. Plans include the creation of ideal profiles for more positions.

## Lessons learned

Leaders at the business services company have found the PXT to be a great tool for helping to ensure that hiring decisions propel the organization toward its goals in a focused way. For other organizations that might want to use assessments similarly, the company offers the following pieces of advice and points to keep in mind.

- **Expect a Dynamic Process** – Ideal profiles are a moving target. Job descriptions evolve, and so must the tools used to identify the best job candidates.
- **No Assessment Tool Can Do It All** – The tool is an asset, but it is the way in which you apply and integrate the tool with other tools and talent processes (e.g., performance management or succession planning) that will determine whether your organization achieves its goals.
- **Be Open to What the Assessments Tell You** – Sometimes organizations look for information to reinforce that they already do the right things or that a change they have already decided upon is the correct choice. That mindset is not ideal for mining the full value of a good assessment tool.



# CASE STUDY

MINING THE FULL VALUE OF AN ASSESSMENT



Call Center Industry

# ProfileXT®

## Mining the Full Value of an Assessment



### AT A GLANCE

The organization uses the PXT in hiring, employee development and succession management, which results in a common language for discussing talent.

### Company background

A privately held global leader in business-process outsourcing recently sought a partner to help with its hiring processes. The outsourcing company found Profiles International and cut costs significantly. The company is especially well-known for providing customer-care call centers and complementary back-office services, but it also provides customized solutions in the areas of sales, technical support, risk management and collections. Headquartered in the Southeastern United States, the outsourcing company operates more than 140 on-shore, near-shore and off-shore solutions facilities in 27 countries, including about 40 sites in the United States.

Essential to the organization's success is the ability to maintain a workforce able to meet the high expectations of a clientele that runs the gamut from financial institutions, to health care providers, to manufacturers, to government agencies, and beyond. The company, which has roughly 60,000 employees worldwide, invests a lot in its associates to ensure they have ample subject-matter expertise and superior people skills. The human resources department estimates that new hires go through several weeks of training. The bottom line: Excessive turnover can significantly increase the cost of doing business.

To help avoid that problem, the outsourcing company began a relationship with Profiles International. Today, all of the company's operations make use of the ProfileXT®, and to support that the vendor has helped to develop 400 to 500 ideal profiles for various positions across the enterprise. But a specific branch in the Southeastern United States stands out for its work to get the most possible value from the tool, exceeding expectations with results in not just pre-hire screening, but employee development and succession management<sup>2</sup>. This case study focuses on that particular site.

<sup>1</sup>The ProfileXT® (PXT) is a multi-purpose assessment often used in the pre-hire screening process. It helps companies to develop a profile of the ideal candidate for a position and compare profiles of actual employees and candidates against this profile.

<sup>2</sup>“Succession management” is a strategic and systemic process for creating successors at many levels of the organization, including non-managerial roles. Succession management refers to an organization's processes for identifying, selecting and managing successors, as well as the processes of career planning and talent migration.





## KEY TAKEAWAY

The involvement of senior management in the selection of an assessment provider reinforces the company's commitment to talent management and increases the speed of adoption of the assessment tools.

“When I went to that training and saw the reasoning behind the tool and, of course, the science behind it along with some of the results of how it worked after we took the test ourselves – it really helped me to come back with more of a story behind it, not just, ‘Here’s what we’re doing.’ And I think that’s critical to implementation.”

## Path to Profiles International

Some years ago, it became clear to leaders at the organization that recruitment models typically used at other companies didn't quite suit its needs. The varied expertise that the company requires of its employees and its preference to consider each applicant for multiple positions are two examples of what makes this outsourcing company unusual.

Also, the organization had encountered cases in which applicants professed certain skill sets, and maybe even actually had skills in what seemed to be the right categories, but nonetheless ultimately proved a bad fit for their positions. So in 2003, the company opted to try looking at more than just competencies, broadening its pre-hire screenings to look at personality and behavioral traits.

Largely through the initiative of one particularly interested executive, the organization found Profiles International. Given the company's underwhelming previous experiences, decision-makers were understandably cautious. When they visited Profiles' headquarters in Waco, Texas, to learn more about what this latest vendor had to offer, they took a show-me mindset.

## Implementation from the top down

The corporate group who went to the three-day training in Waco included the human resources manager for one of the company's sites. The travelers not only studied Profiles' approach, they took assessments themselves. They finished the trip eager to introduce the ProfileXT® in the branch, though some had been skeptical at first.

As the HR manager recalled, “Quite frankly, when someone brings you a new software tool, the first thing you think is, ‘Oh, brother, another thing we’ve gotta learn ... and do we even have time to deal with this right now?’ But when I went to that training and saw the reasoning behind the tool and, of course, the science behind it along with some of the results of how it worked after we took the test ourselves – it really helped me to come back with more of a story behind it, not just, ‘Here’s what we’re doing.’ And I think that’s critical to implementation.”



### KEY TAKEAWAY

The organization has found Profiles International to be ready and able to look into any questions that have arisen along the way, as well as suggest ways to adjust tools or their usage to ensure concerns are addressed.

and able to look into any questions that have arisen along the way, as well as suggest ways to adjust the tools or their usage to ensure concerns are addressed.

As one HR representative commented, “We were able to see right from the start that there was quite a bit of merit to the tools...I really like to see for myself – versus what a company wants you to think.”

“We were able to see right from the start that there was quite a bit of merit to the tools,” said one human resources representative...I really like to see for myself – versus what a company wants you to think.”

### First-hand experience informed the process

Next, members of the human resources team and all senior staff took the assessment. That experience and the discussion that followed – regarding the accuracy of their scores, what was reflected about their personalities, and how they could use those insights in working together – were key steps.

Critical thinking about the accuracy of assessment tools is important for any company that’s looking at using one to guide decisions that will affect individuals’ livelihoods and the future of the enterprise. To be lax on that step in initial implementation or in the ongoing validation of the tools would be irresponsible. The organization found Profiles to be ready

### Identifying top performers

Ultimately, all employees would complete assessments, but next in line for the assessment were new hires and top performers. A composite ideal profile is developed against which job applicants can be measured. But how does a company identify its top performers for an initiative like this? The organization handled the question thoughtfully, aware that missteps here could threaten the success of everything to follow.

Senior leaders met monthly during this stage of implementation, which began with gathering statistics on employees and ranking them. Supervisors then invited top performers to be assessed, making the request an honor. The test itself was given on-site, where human resources staff could explain its purpose and address any concerns.

In deciding which top performers to feed into the composite profile, decision-makers ruled out those whose scores were seen as anomalies. They reasoned that those who had scored extraordinarily high on, for example, the learning index – a measure of how quickly a person learns – might skew the ideal, causing applicants with lower but ample aptitudes to appear less well-suited for a job.



### BEST PRACTICE

To serve the organization's need to assess candidates against more than one job, multiple reports are generated for each applicant against the profiles of all relevant positions.

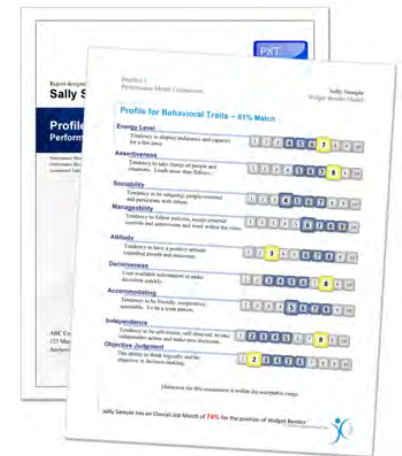
## Using the ProfileXT®

The branch in the Southeastern United States uses ProfileXT® in three primary contexts: pre-hire screening, employee training and development, and succession planning.

### ► Pre-hire screening

The organization's business model and approach to hiring create some peculiar needs when it comes to creating and implementing assessment tools. For example, many companies judge job candidates in terms of their qualifications for only one job at a time. This company prefers to gauge each applicant's suitability for multiple positions at once, and then set the applicant on a path toward whichever position seems the best fit.

To serve that preference, multiple reports are generated from each applicant's assessment, measuring his or her results against the profile for all relevant open positions at a given location. Given the business model, the relevant open positions can be quite diverse. For example, clients include a bank, a health care provider and a credit-card company. And multiple lines of business within the site serve each client in different ways. The health care provider alone gets help with calls from health care practitioners, Medicare inquiries, and questions about billing and enrollment.



This means that greater numbers of ideal profiles are tapped regularly for the organization's operations than what's typical for other companies. At one site, the number is seven. Across the company, the number is 400 to 500.

When someone applies to work at a branch of the company, the application first gets a glance from someone in the human resources department. If the candidate meets minimum requirements, he or she is invited to the site to learn more about the company. Then, if the applicant is interested, comes the ProfileXT®.

PXT results are generated quickly enough for a hiring manager to discuss findings with the applicant during the same visit and specify which job is

Greater number of ideal profiles are tapped regularly for the organization's operations than what's typical for other companies.

“We’ve tried multiple times to make a liar out of the assessment. But time and time again it has shown that it is credible – extremely credible. And we’ve hoped that it wouldn’t be sometimes, when we’ve wanted to take a chance on hiring someone, but unfortunately it was right, and I wasn’t.”

expected to be the best fit. The assessment is designed in such a way that the hiring manager can get a sense of whether the applicant’s answers to similar questions have been consistent. Inconsistency, or distortion, can suggest that an applicant has tried to tell the company what he or she thinks will help to land the job.

Before the next step, the interview, the hiring manager can refer back to the assessment results and use them to tailor an approach that pinpoints areas of distortion, as well as areas where the applicant’s profile deviates most from the ideal. Interviewers use standardized questions, but emphasis in an interview can vary for this purpose.

#### ► Learning and development

If a candidate is hired, he or she goes on to training, and ProfileXT® results are used again at this stage. Trainers receive copies of assessment results, as well as guides for interpreting them, and participate in what the outsourcing company calls “Friday-before” meetings in advance of each group training session.

The meetings are forums for discussing what the assessment has indicated about each applicant’s training needs and how they might affect a particular session. For example, awareness of a training group’s particular mix of learning styles might lead a trainer to adjust his technique. Low scores on the learning index might signal a need to bring in an additional trainer to provide extra help. Trainers have learned that extreme aptitude gaps in a group can make it hard to set a pace for learning that is appropriate for everyone.

Assessment results also are used after training sessions. For example, if conduct problems arise with a particular trainee – or any employee – company officials might examine assessment results for any indication of whether the problem stems from core behavioral or personality traits. If that is the case, it can be a red flag that problems are likely to continue throughout employment. If it’s not, the problems might be attributed to circumstances that will pass or an issue that can be addressed with coaching, which also can be guided by assessment results. If problems are traced to a characteristic on which an employee’s score deviated from the ideal profile, the situation can prompt an adjustment in how that characteristic is weighted in future hiring decisions or reinforce the importance of considering such deviations.



### KEY TAKEAWAY

Companies use assessment tools to screen and assess candidates, uncover strengths and weaknesses, determine job fit and leadership potential, and identify specific development needs that drive success.

An HR representative said, “We’ve tried multiple times to make a liar out of the assessment. But time and time again it has shown that it is credible – extremely credible. And we’ve hoped that it wouldn’t be sometimes, when we’ve wanted to take a chance on hiring someone, but unfortunately it was right, and I wasn’t.”

#### ► Succession management

The outsourcing company found that ProfileXT® results can offer a great starting point for discussions of employees’ potential for promotion, and for identifying the development needs of high-potential employees who want to advance. Because the assessment is part of the hiring process, this discussion of possible career paths can begin very early in the employment

life cycle – as early as the initial job interview. And it can be revisited during performance reviews to keep motivation stoked and to guide goal-setting sessions between an employee and a supervisor.

Assessment results can also offer a tie-breaker when it’s time for tough choices regarding which employees to promote. For example, one branch’s human resources manager noted a recent situation in which two employees were considered strong candidates for a single higher-level opening. In terms of past performance and other criteria, the two were neck-and-neck. But a check of the employees’ assessment results revealed that one was a better fit for the position, and that’s the one who’s likely to get it.

Leaders at the organization appreciate the help assessments offer with what otherwise might be more subjective decision-making. While subjectivity can’t be eliminated entirely, a science-based tool can help to ensure that standards of the U.S. Equal Employment Opportunity Commission<sup>3</sup> are met, and that job candidates and employees are treated fairly.

Figure 1: Attrition Improvements at Site in Southeastern U.S.

	2008	2009
30-day goal	15%	10%
90-day goal	18%	13%

Source: Profiles International, 2010

## Results

The branch in the Southeastern United States reduced its 30- and 90-day attrition goals by 5% and still continue to meet these goals every month. The site’s first quarter 2010 attrition rates are on track for another successful year. These improvements are a direct result of the hard work and focused actions that this outsourcing company took to seek out, select and implement the right solution.

<sup>3</sup> The U.S. Equal Employment Opportunity Commission (EEOC) is responsible for enforcing federal laws that make it illegal to discriminate against a job applicant or an employee because of the person’s race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information. It is also illegal to discriminate against a person because the person complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.







# CASE STUDY

MAXIMIZING EMPLOYEE  
PRODUCTIVITY



Data Services Industry

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# ProfileXT®

## In use by a data service organization



### AT A GLANCE

#### CHALLENGES:

- Maximize employee productivity

#### RESULTS:

This study demonstrated the pattern and effectively identifies Top Performers:

- Top Performers correctly identified as Top Performers by the pattern: 3 of 3
- Bottom Performers incorrectly identified as Top Performers by the pattern: 0 of 3

An organization specializing in corporate policies and data services wanted a better way to identify potentially successful Account Executives. Presented with this task, a study was conducted to examine the relationship between employee productivity and the ProfileXT®.

### Participants

Fourteen Account Executives within the organization served as the sample for the current study. Each employee in the sample was administered the ProfileXT® and had their performance at meeting sales goals evaluated by the organization. Based on the organization's performance evaluations, three members of the sample were identified as Top Performers, three were identified as Bottom Performers, and the remaining eight members of the sample were identified as Average Performers.

### Job Match pattern

A Job Match pattern for the Account Executive position in this study was developed using a Concurrent Study format. The sample's Top Performing and Bottom Performing Account Executives served as the basis for the Job Match Pattern which identifies the unique scoring pattern of Top Performers. This pattern serves as the benchmark to which other employees can be matched.

### Performance grouping

Based on the performance information gathered from the employer and the participants' ProfileXT scores, a pattern was constructed that described the qualities of the existing Top Performers. All 14 Account Executives were matched to the pattern. After a review of the participants' Overall Job Match Percent, a breakpoint of 87% or greater best identified Top Performing Account Executives. This 87% Job Match benchmark serves as a standard to which a candidate is likely to be a good match to the job.

Of the 14 participants in this study, four obtained a Job Match percent of 91% or greater. All three of the Top Performing Account Executives were selected by the pattern developed. Only two of the Average Performing and none of the Bottom performing Account Executives met this same benchmark.

### QUICK FACTS

**\$470k more**  
dollars generated by sales people who were selected by the Job Match Pattern

### Details

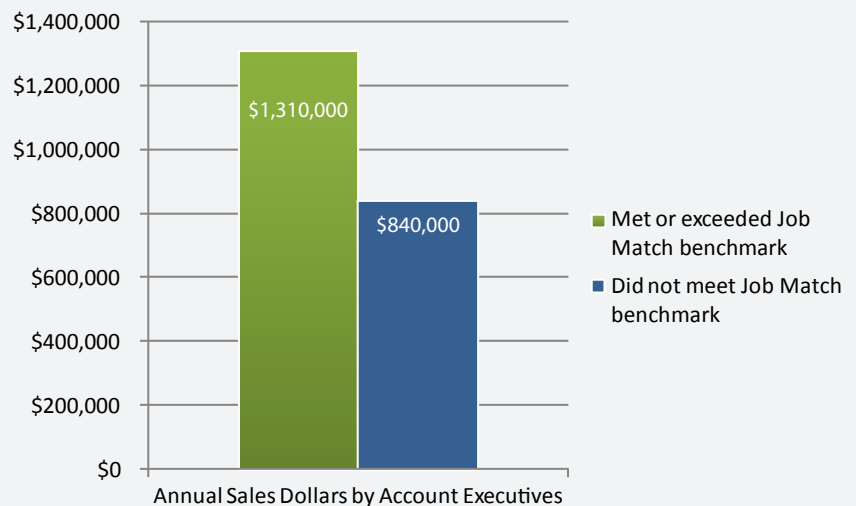
Approximately nine of the ten Top Performers were selected as a good match to the Job Match Pattern, while four out of five of the Bottom Performers were not selected.

While only 54% of the total sample were selected as a good match to the Job Match Pattern, 92% of the most successful sales persons were included in that selected group. Only 20% of those who seem to be challenged by the position achieved favorable pattern match.



1. According to the information provided to Profiles International by the organization, the average sales dollars generated by Top Performers in the Account Executive sample was \$1,250,000, while the average Bottom Performer in this sample generated \$850,000 of their performance goals.
2. The average dollars generated by those who did meet or exceed the Job Match benchmark was \$1,310,000. The average dollars generated by those who did not meet the Job Match benchmark was \$840,000. This is an average difference of \$470,000 between those selected and those not selected by the Job Match Pattern.

Clearly, selection practices at the organization have been improved by using the ProfileXT®.



### Summary

Using the ProfileXT to benchmark employees, the organization is able to successfully screen Account Executive candidates. Of the five individuals who either met or exceeded the Job Match Percentage benchmark, none were Bottom Performers. Additionally, 100% of the Top Performers were included in this group. Clearly, selection practices at the organization have been improved by using the ProfileXT.







# CASE STUDY

USING LEADERSHIP  
DEVELOPMENT TO REDUCE  
TURNOVER



Financial Services Industry

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imagine great people®

# CheckPoint 360<sup>™</sup>, ProfileXT<sup>®</sup>, & Profiles Performance Indicator<sup>™</sup>

Cash-Handling Corporation Uses Leadership Development to Reduce Turnover



## KEY TAKEAWAY

Assessment solutions can be applied to different talent processes including leadership development and recruitment.

## Company overview

A multinational cash-handling corporation perhaps best-known for its armored transport service – the roots of which go back to the gold-rush days in America’s Old West and Alaska – recently turned to assessments to address an increasing turnover rate.

Today, the corporation deploys a fleet of roughly 3,000 armored trucks and other vehicles in the United States to continue providing the secure delivery of cash and coin to financial institutions and other businesses. The company stocks and empties automatic teller machines; provides outsourced vault solutions, transports and warehouses inventory for the Federal Reserve System. In addition, the cash-handling company provides an array of other products and services to help clients manage payment systems and other aspects of the financial supply chain, both physically and electronically.

The corporation has 400 operating locations in the United States, as well as 11 in Europe. Its U.S. workforce includes 8,000 employees. Geographically in the U.S., the company is broken down into districts, areas and branches. The focus of this case study is on the Texas district.

In recent years, the company’s Texas branches have tackled the issue of high turnover, each using Profiles International assessment solutions, but with a different focus. The Texas district has used the tools to launch and sustain a leadership development initiative under the premise that strong leaders will help to create an environment in which employees want to remain. It is worth noting that the use of tools from Profiles has also spread to the corporation’s Colorado district, with a focus on pre-hire screening. (See section, “Case in Point: The Colorado Story” later in this case study).





### AT A GLANCE

Through the use of observations, employee complaints and attitude surveys, this company uncovered a need to enhance the leadership capability of its managers.

“These tools have helped the company to ensure that skills gaps are correctly identified, that development tactics specifically target those needs, and that progress is tracked and evaluated to guide next steps.”

### Assessment tools

Profiles International<sup>1</sup> has worked with the cash-handling corporation in Texas to craft an assessment solution that initially employed three tools – the CheckPoint 360™<sup>2</sup>, the ProfileXT® (PXT)<sup>3</sup> and the Profiles Performance Indicator™ (PPI)<sup>4</sup>. These tools have helped the company to ensure that skills gaps are correctly identified, that development tactics specifically target those needs, and that progress is tracked and evaluated to guide next steps.

### A focus on leadership development

The relationship between Profiles and the cash-handling corporation began in Texas in December 2005. At that time, the company was struggling with an annual employee turnover rate of more than 50 percent across this district. Upper management took a hard look at the situation and concluded that ineffective branch-level leadership was a primary contributing factor.

Branch managers were found generally to have mastered the technical, logistical and other operational challenges of the business. Their branches made money. But the costs associated with recruitment and moving existing workers around to keep understaffed sites running were eating significantly into profits. Managers were not incorporating the big-picture costs of turnover into their perspective on employee relations.

Observations, employee complaints and attitude surveys indicated that managers lacked leadership skills. So, with help from Profiles, the corporation embarked on an employee-development effort to change that.

### Change management

To inform managers of the leadership development initiative, the assessments and other activities planned, HR leaders at the company's

<sup>1</sup> Source: <http://www.profilesinternational.com/home.aspx>.

<sup>2</sup> The CheckPoint 360° compiles feedback from direct reports, peers, supervisors and customers to generate an overall picture of how a particular employee is perceived on the job.

<sup>3</sup> The PXT is a multipurpose assessment often used in the pre-hire screening process. It helps companies to develop a profile of the ideal candidate for a position, and compare profiles of actual employees and candidates against this profile.

<sup>4</sup> The PPI is a psychometric assessment that helps to define a person's natural tendencies to determine how job activities might mesh or conflict with those tendencies.



### KEY TAKEAWAY

In a recent study of more than 350 companies, Bersin & Associates found that 360-degree feedback, leadership style and personality are the three most common assessments for managers, regardless of level.

“We had to tell them what we were trying to do. We basically said, ‘Don’t be scared to be honest with us. We need that. Your managers need that, so that we know how to further develop you.’”

branch in Texas held kickoff meetings with everyone who was going to be involved. As the effort got underway, meetings and conference calls continued regularly to update participants on the purpose and scope of each new phase.

Care was taken to emphasize that, while participation was not optional, the initiative was not punitive. The company’s leaders presented it as an investment in its managerial and supervisory workforce – one that the company hoped would be greeted with focus and enthusiasm. That hope was not realized 100 percent, as this case study will explain. But overall, organizers said participants are finding personal and professional value in the process.

Non-managerial employees also were made aware of what was happening, but through communication that was more scattered and may not have reached the entire workforce. For example, one forum for discussing the subject arose through the employee-attitude surveys that the company had conducted for years. When the issue of managerial effectiveness came up in those surveys, the HR department sought to reassure workers one-on-one that an improvement initiative was in the works.

Also, because the assessment plan included use of the CheckPoint 360™, feedback was sought systematically from all of the participating managers’ direct reports, including hourly workers.

The HR manager, who has been involved in orchestrating the initiative, recalled those conversations. “We had to tell them what we were trying to do. We basically said, ‘Don’t be scared to be honest with us. We need that. Your managers need that, so that we know how to further develop you.’”

### Implementation and support

The corporation’s assessment-based turnaround effort in Texas started with the CheckPoint 360™. This survey was administered not just for top management, but for all supervisors and managers – in other words, three tiers of leadership, including initially about 20 people. Since then, as a result of reorganization, the number of branches in the district has grown. Managers in recently included branches are going through the assessment process now.

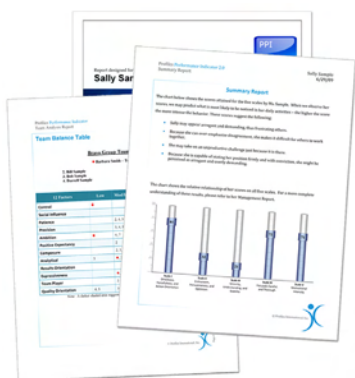
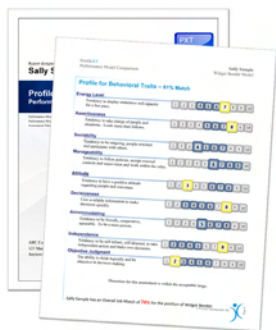
# CASE STUDY

## USING LEADERSHIP DEVELOPMENT TO REDUCE TURNOVER



### BEST PRACTICE

This company used three different types of assessment tools that revealed a full picture of leaders' behaviors, personality traits and competency gaps.



Based on the results of this assessment, Profiles International made recommendations regarding what development plans should include for each participant. In most cases, the plans included one-on-one sessions with a coach from Profiles, on a monthly/bimonthly basis for six months or so. As coaching sessions got underway, the cash-handling organization and Profiles implemented the other two primary assessments – the ProfileXT® (PXT) and the Profiles Performance Indicator (PPI).

Each of the three tools helped to provide a different piece of an overall picture.

1. The **CheckPoint 360™** offered a clearly relevant starting point for discussion by laying out how individual managers were perceived on the job from all directions.
2. The **ProfileXT®** focused on the behavior patterns driving those perceptions.
3. The **Profiles Performance Indicator™** focused on personality traits driving those behavior patterns, offering a basis for discussing which natural inclinations were helping managers on the job and which might create a need for adaptive skills.

With that information, coaches and individual managers were able to examine what changes would improve their effectiveness and how those changes might be achieved. The HR manager for this initiative commented, “I think for the most part they’re really starting to understand that they’ve got somebody they can sit there and talk to. If they’re mad about something or they need to know how to work through a situation ... they can just kind of work through the problems that they’re having.”

Meanwhile, group workshops were also held. Topics have included everything from time management and communications to presentation skills. The company and Profiles work together to tailor workshops to whatever will be most beneficial at a given time, and HR often receives suggestions from participants regarding future topics. Workshops are open to all managers going through the development program; in addition, “lead employees” who are not yet in managerial roles are also allowed to attend. Lead employees are solid performers who are thought to have what it takes to advance at the organization, comparable to what other companies might call “high potentials.”



### KEY TAKEAWAY

Assessments help define the critical skills necessary to drive organizational performance.

“Turnover, of course, started to drop. But also just the contact – if I saw a manager having a conversation with an employee, I would see a different way of communicating ... It was a change that not just one person could see. We were all able to see that it was helping.”

The one-on-one coaching sessions offered an opportunity for managers to discuss individual progress and obstacles, as well as provide a recurring point of accountability. Together, those ongoing provisions for behavioral change helped to ensure that assessment results would not just be looked at and forgotten. Rather, the organization had a chance to deeply penetrate processes and attitudes impacting the overall culture at the company.

Improvements came quickly as the leadership development initiative was implemented. According to the HR manager, “Turnover, of course, started to drop. But also just the contact – if I saw a manager having a conversation with an employee, I would see a different way of communicating ... it was a change that not just one person could see. We were all able to see that it was helping.”

Turnover in the district’s 16 current branches now averages less than 30 percent monthly, a big improvement. Recruitment costs have fallen from more than \$100,000 to \$20,000 to \$30,000 annually – and that amount is largely just to keep an advertising presence in the particularly large Dallas market, as opposed to being a cost directly related to problem-solving.

Still, some managers viewed the process as unnecessary for themselves and an unwelcome draw on their time. There was a philosophical disconnect regarding the importance of the effort. In at least one case, resistance led to a manager’s exit from the company – a tough loss for superiors because the manager handled a branch that performed quite well financially. The confrontation challenged the organization’s commitment to what it had begun, but the commitment remained.

Overall, managers are seeing the benefit of the time spent. Workshops in particular are anticipated with enthusiasm, as organizers are often approached with suggestions and the question, “What have we got going on next?”

### Ongoing efforts and next steps

Clearly, the assessments are not viewed as one-time diagnostics at the cash-handling corporation. Rather, the assessments and other services that Profiles International provides have become a key component of the company’s overall talent and performance management processes.



### KEY TAKEAWAY

The assessments and other services Profiles International provides have become a key component of this company's overall talent and performance management processes.

“There's been such huge improvement within our area since using [Profiles' tools and services], why turn away from something that's working?”

For example, the company's HR leaders for this district meet quarterly with the overall district manager and his direct reports to discuss performance management matters and to set goals. Profiles assessments and services, as well as the status, are a big part of those discussions. On a yearly basis, the organization's primary contact at Profiles is invited to weigh in on what Profiles can provide to ensure efforts are tailored to meet current needs. These discussions cover not only individual improvement plans for managers, but also organizational needs and trends that merit consideration from a broader business perspective.

Profiles also provides training for HR professionals to ensure they are able to support efforts internally in ways that also are continuously improving.

In the coming year, the corporation plans to do a second round of the three assessments that were conducted at the start of its relationship with Profiles International four years ago – returning to the same managers, as well as assessing new participants for the first time. Finally, the company is implementing a fourth Profiles assessment tool – the Employee Engagement Survey<sup>5</sup>. All of this is aimed at providing a fresh base of information for new individual development plans and to guide continuous organizational improvement.

As for the Texas district, planners have no intention of relaxing the leadership development initiative, or of reducing its use of Profiles' tools and services. As one HR manager put it, “There's been such huge improvement within our area since using [Profiles' tools and services], why turn away from something that's working?”

<sup>5</sup> The Workplace Engagement Survey™ measures the degree to which employees connect with their jobs, and feel committed to the organization and its goals.



### KEY TAKEAWAY

The company wants to investigate options for making the most of assessment information to aid in retention, not just screening.

Awareness of profile deviations could conceivably be used to develop onboarding plans that avoid problems or to craft solutions to any problems which could arise.

### Case in point: the Colorado story

The focus in Colorado is on using assessment tools (particularly the PXT) to screen job applicants more thoroughly, with the hope of selecting those most likely to be a good fit for the organization. The PXT has been integrated into the hiring process and provides guidance with a predictive performance model.

The jobs relevant to this case in point fall into two categories – driving jobs (in which employees transport cash and coin) and non-driving jobs (in which employees work primarily inside a facility). For each position, a profile of ideal employee characteristics has been compiled, using current top-performing employees to create a composite model. These profiles are the backbone of Profiles's PXT assessment.

Hiring at the corporation begins with the application process. Once applications are received, a hiring manager invites applicants to complete the PXT assessment online or in person to gauge their compatibility with a particular job. Applicants are compared to the scores of those who are successful in the job. Advancement in the hiring process is dependent on the compatibility of the applicant's behavior that is required for success in each position.

Currently, once an applicant scores within the acceptable range for a job, he / she essentially has a "foot in the door." Subsequent steps in the hiring process (such as interviews, polygraph results, background checks and physicals) determine the final applicants and, ultimately, the candidate to whom an offer to join the team is extended.

The information gathered through assessments has proven to be quite valuable in interviews themselves. An interviewer can hone in on areas in which an applicant's behaviors differ most from the ideal profile, asking questions to gain a sense of whether the behaviors might prove problematic or if the individual is able to adapt his / her behavior.

### Post-Hire Uses for Assessments

Assessments are being used post-hire in cases in which the organization's employees ask to change jobs. The assessment data is compared against other positions to ensure each person can be successfully transitioned to greater responsibility.

Currently, if the company has an assessment on file for an internal or external job applicant, reuse is considered appropriate. The applicant's existing profile is compared with the ideal profile for the new position and a new score is generated. If that score tops 70, the interview process can proceed.

Indeed, awareness of profile deviations could conceivably be used to develop onboarding plans that avoid problems or to craft solutions to any problems which could arise. So far, assessments have not been used in those ways at the branch in Colorado – but the company wants to investigate options for making the most of assessment information to aid in retention, not just screening.





# CASE STUDY

DEVELOPING SUCCESSFUL  
LEADERS WITH PROFILEXT®  
& STEP ONE SURVEY II®



Financial Services Industry

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## ProfileXT® and Step One Survey II® Changing the Conversation from 'If Only' to 'Let's Try This'



### AT A GLANCE

#### CHALLENGES:

- reduce attrition of employees
- decrease turnover and its costs
- increase productivity
- address employee disengagement
- recruit, hire, and retain talent

#### SOLUTION:

- identify strengths of high performers
- create performance models
- provide training in candidate selection, employee development and coaching, and team development

#### RESULTS:

- reduced turnover
- increased engagement
- \$1 million saved in turnover costs

Even when organizations celebrate 25-year employment anniversaries, and even in offices where 10 years is the average tenure, the malaise of turnover can fester and threaten productivity. Organizations are especially vulnerable when times are financially tough.

Through its collaborations with Profiles International, a Texas credit union has discovered that one of the most effective ways to treat workforce ailments is to know the strengths of its players on every team. "We call it putting the right people on the bus, in the right seats on the bus, and pointing the bus in the right direction," a human resources business partner responsible for recruitment and coaching said.

As one example of pointing the bus in the right direction, company leaders used assessments to reduce adjusted attrition of employees from 12.5 percent to four percent from 2008 to 2009. Adjusted attrition does not count people who leave for family reasons, to return to school, etc.

The organization continues to examine both new job candidates and teams throughout its 450-person workforce in a climate where demands of the business and worker expectations are always changing.

### Business culture

In 1953, when 11 employees of a Texas company pooled their money to form a credit union to serve fellow employees, they founded an institution that would eventually grow to include six counties and create subsidiaries to serve customer needs.

The credit union served only employees of one organization for almost 40 years. Its leaders decided in 1991 to expand the membership to include employees of other businesses. In 1998, it expanded yet again, this time with a charter that permitted members from surrounding communities to join.

Today, 31 branches serve more than 140,000 members. As of 2010, the credit union managed more than \$1.7 billion in assets.

# CASE STUDY

DEVELOPING SUCCESSFUL LEADERS WITH  
PROFILEXT® & STEP ONE SURVEY II®

Through its collaborations with Profiles International, a Texas credit union has discovered that one of the most effective ways to treat workforce ailments is to know the strengths of its players on every team.

The 450-employee organization includes two subsidiaries—a brokerage firm and an insurance group. The financial arm ranked in the top five out of 340 brokerage service programs in the country in 2009, and two of its representatives achieved Gold Premier Consultant status with the international financial services firm Genworth. The insurance operation provides insurance to members and businesses through personal lines, commercial lines, and employee benefits.

The credit union remains the heart of the operation and claims most of the employees. It focuses on consumer real estate lending as well as loans for new and used automobiles, home improvements, and other personal items. Its competitive rates created \$315 million in new loans in 2009, when financial markets struggled.

One linchpin of the company's culture is the donations it makes to favorite causes. In 2009, the Texas Education Agency gave the organization its Employers for Education Excellence Award in recognition of the credit union's financial literacy efforts. Managers volunteered to teach classes at both the elementary and high school levels. The company has contributed more than \$38,000 to supply classroom-learning materials.

Employees also give time, money and other resources to the Juvenile Diabetes Research Foundation, United Way, American Red Cross, Carter Blood Care, the Children's Miracle Network and the USO. Their contributions support the company's vision to be "the financial institution of choice," as well as its mission, "to improve the economic well-being of our member/owners."

The company operates in an environment that the human resources recruiter calls "very customer-service oriented." She describes the warm atmosphere with stories about candidates who come in for job interviews and say, "This is the friendliest organization I have even been in. Everyone who walks through says 'Hi, how are you? Can I help?'" "From our CEO to whoever happens to be walking through, that's who we are."

# CASE STUDY

DEVELOPING SUCCESSFUL LEADERS WITH  
PROFILEXT® & STEP ONE SURVEY II®



## QUICK FACTS

**\$1 Million**

saved in turnover costs when leaders correctly implemented the assessment process

**8.5% less**

attrition of employees from 2008 to 2009 as a result of using assessments

## Background

The organization's first contact with Profiles started in a traditional way. In 1995, leaders were concerned about turnover and its costs, and they sought counsel from Profiles. Profiles began to help Texans with two pre-hire assessments—ProfileXT® and Step One Survey II®.

The area of greatest churn was in the teller position, so the process began there. Exit interviews showed that workers were leaving for a variety of reasons, including: performance issues, career enhancement, money, differences with management, job dissatisfaction, and family reasons. The human resources staff built patterns for tellers and branch managers based on top performance and began using the assessments to select candidates that matched the performance models.

Over the years, challenges surfaced during performance reviews, including inconsistencies in the use of the assessments and in the application of the results. Between branches, there was an inconsistent candidate selection process. Leaders worked to correct the process and eventually saved more than \$1 million in reduced turnover.

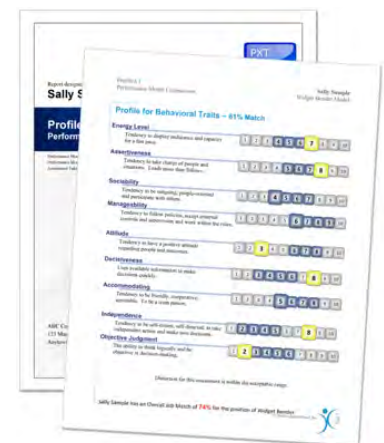
This success allowed executives to look at other issues that come up in an economic downturn: how to recruit, hire, and retain the talent they wanted. They began studying employee engagement. Once again, they turned to PXT and SOS assessments to see how they could help.

## ► ProfileXT®

The organization and Profiles collaborated on a strategy that would use the PXT to examine worker job fit and culture fit. They looked again at top performance models by position and reviewed each branch of the organization. Profiles provided managers with training on using the PXT for candidate selection, employee development and coaching, and team development.

In addition to the turnover drop from 2008 to 2009, leaders have seen these results among the managers:

- They addressed inconsistencies in the business metrics and evaluation of performance. They are revamping processes to use more objective metrics and a more consistent evaluation process.
- They instituted formal coaching processes for managers and employees to help them understand themselves in the context of their employer's culture.





# CASE STUDY

DEVELOPING SUCCESSFUL LEADERS WITH  
PROFILEXT® & STEP ONE SURVEY II®

- They used the PXT to give them a greater understanding of team dynamics and manager-employee compatibility.
- They report a shorter time in training and coaching new employees to the point that they are fully proficient in their roles.
- They know how to engage in discussions involving performance, development and career management.
- They view the human resources team as partners in growing the business.
- They link talent management to business results.
- Finally, employees report that their managers take the time to get to know them.

“The PXT helped us understand who we have on our team and who we are inviting to be on our team,” the HR business partner said. “They may be having issues in their job or they may be looking to move to another position.”

Because of the significant results from the PXT, the organization has used it with every job candidate since the end of 2007. Managers are improving their skills at using assessments as they gain experience with them, and two leaders in the human relations department “touch every issue” that arises. “When we have an issue, the first thing we pull out is the PXT to see who we are dealing with, who is on our team,” the business partner said.

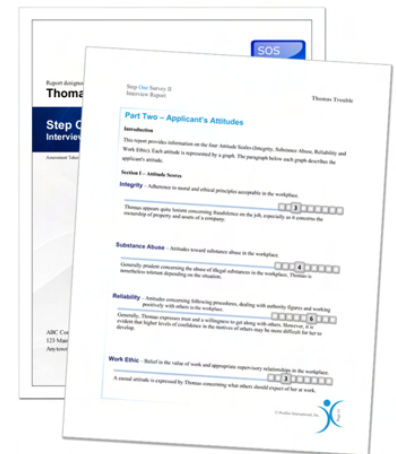
## ► Step One Survey II®

The credit union has used SOS since 2003. Every employee takes the assessment, including all job candidates. “This is the integrity link; it shows their work ethic or their propensity for substance abuse, for example. They must take this to get an interview,” said the recruiter, who has worked in the same field since 1990. “It is the ‘do or die’ assessment. I have been interviewing people for years, but you can interview all day and not discover someone’s integrity. That’s a tough one.”

## The company’s goal

The newest focus at the organization is tackling employee disengagement. The engagement issue arose as a red flag during twice-per-year employee surveys and exit interviews that HR employees conduct with everyone who leaves. For the recruiter, one of the biggest signals of lack of engagement is a leave of absence. “To me, that is one of the first indications that people are not happy.”

Work on the thorny problem of disengaged employees began at the branches, where leaders “started peeling back the layers to find out why people are leaving.” And while the PXT is a “wonderful tool for turnover control,”



the recruiter said, “it also helps engage those who might be on the fence.” Issues that came up included a lack of trust in management, the feeling of not being heard, and fears sparked by the organization’s battles within a struggling economy.

Leaders implemented a tool that allows employees to complain or compliment the company, and they see it used more and more. Employees want to know “What does this mean to me? Is my job on the line?” the recruiter said.

“If you don’t know who is on your team, how can you leverage your strengths, grow people, and let people play to their strengths?”

“We see a lot of hunkering down, and activity may not be what it used to be. People are not as creative as they were in solving problems, in saying, ‘Let’s do this, or ‘let’s try that.’ It’s more, ‘I don’t know how to fix it.’ That is not atypical when companies go through times like this. It’s the ‘If only’ statement—‘if only this’ or ‘if only that.’”

Although employees are extremely creative in some areas, average employees are “heads down, walking in, doing their jobs and going home.”

Leaders have embarked on an engagement initiative in all of the credit union’s branches. They used the PXT with all employees, from tellers to branch managers. “We put together what each team looked like and what each member looked like. This allowed managers to understand

who was on their team,” the HR executive said. “This has the biggest impact on our organization. It helps us with employee relations, staff development and succession planning. Because if you don’t know who is on your team, how can you leverage your strengths, grow people, and let people play to their strengths?”

After using PXT in the branches, HR began using it at the corporate level. As they merged separate departments, they used PXT to bring employees together as a team. “In this way, they get to see their own occupational interests and strengths.” It opens up communication and a dialogue,” the HR executive said.

Powerful results encouraged leaders at the organization to use the PXT to build teams in two different corporate groups, and executives at the top wanted to see more of it. Although turnover is still an issue, especially at the branch level, the PXT is still helping Texans identify patterns and leaders are looking at teams more clearly by using the “PXT lens,” the recruiter said. “Turnover will always be an issue, but at the core of that is engagement.”

## General benefits of assessments

The general benefit that Profiles International offers the organization is a supportive relationship. “They understand our business and have made it their business to know who we are,” the recruiter said. “They have enveloped themselves in our culture, from the CEO to the line employee. That is their business and they live it.”



# CASE STUDY

DEVELOPING SUCCESSFUL LEADERS WITH  
PROFILEXT® & STEP ONE SURVEY II®



## KEY TAKEAWAY

### Summary

With help from assessments, the organization changed from a command control, tactical organization to one that developed leaders at all levels.

With help from assessments, the organization changed from a command control, tactical organization to one that developed leaders at all levels. Making that change was difficult, not because managers did not want it to work, but because they feared stirring the pot. “There was a huge fear of the unknown,” the recruiter said. They wanted to know what would come of seeking more information and involvement from workers.

“They began to see that this isn’t stirring the pot, but opening communication and possibilities.” When top executives started using the PXT to build teams, everyone else followed the example.

Leaders learned that the PXT is only as good as the pattern they created, and they learned that they need three patterns. “You need to have job pattern, a culture pattern and a team pattern. If you look at that, you cover all your patterns,” the recruiter said.

The organization needs to interpret the results alongside the knowledge of what each role requires. For example, a teller position requires different strengths than does a business analyst position. Someone who scores low-independent and high-manageability is going to follow the rules and be better suited to some positions than others. “There was a lot of head scratching when we asked, ‘Who are your best performers?’ So we pulled out the PXT to see what people looked like.” After that, the organization had to ensure that the patterns were customized for each position and that hiring managers understood what the patterns meant.

“This allows you to get down to putting patterns together to fit the job,” she added. “We are still in the middle of that. It’s been painful but very good. It’s been a really good step in the right direction. We are growing our managers into leaders. When that happens, we have a totally different conversation. It’s a very different mindset.”

### What’s next?

The organization uses Customer Service Profile™ as needed. Managers are just beginning to use Profiles Performance Indicator™ and are considering CheckPoint 360™, which organizations use to help grow effective leaders, build a talent bench, guide leaders through career transitions, develop top talent and use leadership development to enact key changes in the business.

“The great thing is, the passion is still here,” the recruiting executive said. “Employees have tremendous support for and camaraderie with each other. We celebrate 25-year anniversaries all the time.”





# CASE STUDY

REDUCING TURNOVER &  
INCREASING PRODUCTIVITY  
WITH PROFILEXT & JOB  
MATCH PATTERN



Financial Services Industry

# ProfileXT®

## Creating Loans without Obstacles, Customers for Life



### AT A GLANCE

#### CHALLENGES:

- Over 70% turnover
- Low workforce productivity

#### SOLUTION:

Executives decided on the ProfileXT® to help them develop a Job Match Pattern for future hiring. The JMP helps managers quickly see where individuals might fit well into a position, or where they might have to make adjustments to do the job. It scores on a scale of one at the low end and 10 at the high end.

#### RESULTS:

The number of loan originators who reached or surpassed their quota increased tremendously, with 34 percent of new hires producing 75.8 percent more volume than those workers not meeting their quota.

- **\$11 million revenue** generated by the 62 participants with a Job Match of 80% or greater
- **\$4.9 million revenue** generated by the 54 participants with less than 80% Job Match

With a relationship forged in May 2007 in the face of complex employment issues, a top Texas mortgage lender and Profiles International became allies in the battle against high turnover and low workforce productivity. The connection between the two companies helped the lending organization create performance standards that led to a tripling of its branches and its workforce in two years. This leading lender reaped success during a bleak recessionary period for the global economy.

Progress continues today as the residential mortgage company, licensed to operate in 49 states, continues to seek opportunities with an array of products, sophisticated loan professionals and a commitment to the goal of creating lifetime customers.

### A company with strong moorings

The mortgage lender's triumph over productivity and turnover issues helped make the company one of Profiles' Outstanding Clients in 2009. The organization's swift move to reduce turnover resulted in a healthy return on investment of almost \$100 for every \$1 spent.

The history of this leading residential mortgage company reveals strong moorings in one of Texas' most populous cities. The CEO established the lending agency in one office in 1986 with a staff of 20 professionals producing \$80 million annually. From the start, its core values provided fertile ground for the organization's growth. In 2002, the company surpassed the \$1 billion mark in production. In 2008, it ranked as the number one FHA lender in Texas. By 2009, it had gone beyond its own record for dollar amount of loans in a single quarter.

The organization's convictions, which are displayed prominently on the company's website include: honesty and integrity, encouraging a people-centric culture, creating engaged employees, adapting to changing economic trends, exceeding customer expectations and fostering teamwork. Frequently Asked Questions, or FAQs, also displayed on its website, add to the organization's promotion of clarity in the lending process. New and experienced borrowers can find answers here, and the organization wants those answers to be simple and understandable as customers seek ways to purchase their dream homes.

“When considering new growth opportunities, cultural fit is extremely important to us. This is a critical ingredient in our recipe for success.”

The organization’s open culture means that executives operate under an open-door policy and encourage employee creativity. Leaders seek ideas that come from within. This atmosphere helps executives promote their goal of unsurpassed quality service and support throughout the entire mortgage process. The organization’s products include numerous choices for customers who are navigating the fast-changing and often complex mortgage procedure. The company’s ultimate goal is to provide the kind of service that creates customers for life.

### Seeking increased revenue production

Leaders at the agency approached Profiles with the specific goal of increasing the revenue production of its loan originators. The problem was twofold. Some of the loan originators were not meeting the loan closure quotas their roles required. Also presenting problems was the high turnover resulting from missed quotas or other workforce problems. The average turnover for two years before the organization and Profiles joined forces was a growth-stifling 72.8 percent, almost 500 of the firm’s employees.

Executives decided on the ProfileXT® to help them develop a Job Match Pattern for future hiring. The JMP helps managers quickly see where individuals might fit well into a position, or where they might have to make adjustments to do the job. It scores on a scale of one at the low end and 10 at the high end.

Based on the pattern, which reflects skills and traits necessary to succeed in a specific position, leaders can see where the scores of the most effective performers fall. The typical pattern has a range of three to five units, and the more outside of this range a worker or potential worker scores, the less likely it is that he will fit that particular part of the job. Thus the JMP can help executives know who will fit best in a position, and in coaching those in the job in the areas where they are struggling.

For the mortgage lender, this pattern would reveal which potential workers best fit the role of loan originator. It would also show the company’s leaders which individuals best fit the organization’s creative, fast-moving culture. One top executive said: “When considering new growth opportunities, cultural fit is extremely important to us. This is a critical ingredient in our recipe for success.”





### QUICK FACTS

**\$11 million**

revenue generated by the 62 participants with a Job Match of 80% or greater

**\$4.9 million**

revenue generated by the 54 participants with less than 80% Job Match

Leaders at the company studied its own top performers—those workers who were meeting or surpassing their quotas—to help determine thinking styles, behavioral traits and occupational interests best suited to the loan originator role. The PXT helped evaluate these workers in three specific areas:

- **Thinking Style** – This evaluates an individual’s competence in verbal and numerical reasoning. It looks at a person’s ability to use what he already knows applied to new experiences. It then measures the flexibility of thinking required to grasp concepts in a job or training setting. Results can show both cognitive flexibility and a person’s comfort level in different learning settings.
- **Behavioral Traits** – Examples of behavioral traits on the PXT include energy, assertiveness, sociability, manageability, attitude, decisiveness, independence and objective judgment.

The PXT also provides a distortion score which reveals the reliability of the behavioral section of the assessment.

- **Occupational Interests** – This section assesses an individual against six areas of interest. Every job has three areas of interest that are more important and three that are less important. Research indicates that if areas of interest match, the job candidate will be happier in the role and be a better performer. In the loan originator role, the top three areas of interest are people service, enterprising and creativity; the less important interest areas for this position are financial/administrative, technical and mechanical.

After executives reviewed the scores, they identified 11 workers as top performers, and another 11 as bottom performers. The mortgage lender then used the Job Match Pattern for more analysis to better distinguish the pattern between top and bottom scores.

The next move was to match 116 loan originators in the organization against the custom-designed pattern. Leaders decided that an 80 percent match to the pattern would best identify the highest performers. Of the 116 participants, 62 obtained a Job Match Percent of 80 percent or greater. Ten of the 11 top performers had a strong fit to the pattern. They averaged almost \$40 million in sales over the evaluation period. Meanwhile, bottom performers averaged less than \$1.5 million in sales over the same period.



Further study showed that the 62 participants who best matched the pattern generated \$11 million in revenue, while the 54 who did not score an 80 percent or better match to the pattern generated \$4.9 million in revenue.

### What the PXT accomplishes

The organization then used the ProfileXT's® Job Match Pattern as a benchmark when deciding which loan originator candidates to hire. Worker performance increased dramatically in five areas after the organization started using its custom-designed Job Match Pattern as a criterion for selecting new employees. The areas that most showed improvement include:

- **Verbal reasoning**, or the ability to use words as a basis in reasoning and in solving problems.
- **Assertiveness**, or the tendency to lead more often than follow and take charge of people or situations.
- **Manageability**, or the tendency to follow policies and work within the rules.
- **Independence**, or the tendency to be self-reliant and make one's own decisions.
- **Objective judgment**, or the ability to think clearly and objectively when making decisions.

Additionally, “creative” was one of the top three educational interests for the loan originator role.

Once company leaders established what they wanted to see in a loan originator, the new people they brought in using the 80 percent JMP registered a better fit to both the job and the organization's culture. From September 2007 through May 2009, the company hired 772 people and retained 459—or 59.5 percent. The organization's turnover dropped from more than 70 percent to 40.5 percent.

Additionally, the number of loan originators who reached or surpassed their quota increased tremendously, with 34 percent of new hires producing 75.8 percent more volume than those workers not meeting their quota.

“The number of loan originators who reached or surpassed their quota increased tremendously, with 34 percent of new hires producing 75.8 percent more volume than those workers not meeting their quota.”



### KEY TAKEAWAY

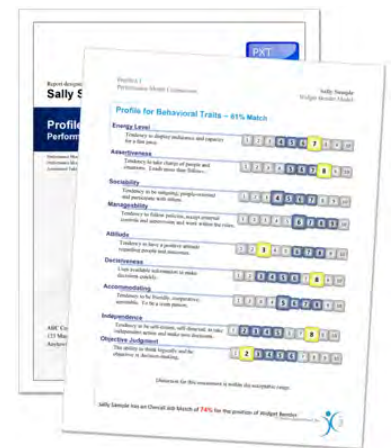
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### Summary

Despite strong challenges in the mortgage industry, this lender has expanded its organization from 600 to almost 2,000 employees, and increased from 40 branches to 160, operating in 49 states. The expansion came at a time when the worldwide economy shrank and the mortgage industry as a whole suffered major casualties. This organization’s staff produces more than \$5.75 billion annually.

Such growth does not happen by accident. Said the organization’s president and COO: “It requires an enormous, coordinated effort on everyone’s part to successfully onboard new branches and employees within a tight window of opportunity. Shared values, integrity and a desire to reach out and help others are all things we look for when meeting potential candidates. It is what makes us who we are, and Profiles’ solutions are an integral part of our operation.”  
- President and COO



“It requires an enormous, coordinated effort on everyone’s part to successfully onboard new branches and employees within a tight window of opportunity. Shared values, integrity and a desire to reach out and help others are all things we look for when meeting potential candidates. It is what makes us who we are, and Profiles’ solutions are an integral part of our operation.”



# CASE STUDY

REDUCING TURNOVER  
WITH PROFILEXT® AND  
JOB MATCH PATTERN



For-Profit Education Industry

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# ProfileXT®

## ProfileXT® and Job Match Pattern Earn A+



### AT A GLANCE

#### CHALLENGE:

Enrolling students in the accelerated career programs at a Utah-based college requires a specialist with brains, creativity, and empathy. These skills must be tempered with the ability to move quickly and the determination to go the distance. Employees with these competencies are in high demand.

#### SOLUTION:

Executives at the college discovered that the unique job-matching feature of the ProfileXT® provides an efficient complement to their recruiting of admissions specialists. PXT helps the college's executives screen numerous applicants for the job while supporting a job fit that helps slow turnover.

#### RESULTS:

College leaders also believe that using the Job Match Pattern helped reduce turnover by six admission representatives in 12 months, resulting in an additional savings of more than \$800,000. That figure factors in the cost of giving a low-performing representative multiple, expensive leads each month.

Enrolling students in the accelerated career programs at a Utah-based college requires a specialist with brains, creativity and empathy. These skills must be tempered with the ability to move quickly and the determination to go the distance. Employees with these competencies are in high demand.

Executives at the college discovered that the unique job-matching feature of the ProfileXT® provides an efficient complement to their recruiting of admissions specialists. PXT helps the college's executives screen numerous applicants for the job while supporting a job fit that helps slow turnover.

The institution's return on investment from using PXT has arrived in the form of both job satisfaction and dollars and cents.

### A history of the college

The college's roots go back more than 30 years, to 1979, when it specialized in one field of learning. The owners of another college purchased the specialty training school in 2001, and launched a new group under one name.

Since then, the group has expanded to five campuses encompassing 2,000 students. All locations have a strong student-to-teacher ratio, and the college strives for a 95 percent or higher job placement of graduates.

The college group is a resource for students who are ready to trade up from jobs with little future. Most of its students are between the ages of 18 and 34, and 73 percent are women. "They are upwardly mobile students who rent and look forward to someday being able to buy a home," said a vice-president of the college group. "The majority of them are seeking their first real career. They have worked, but are looking for a more stable position in life."

College leaders gives these career-minded students relevant employment training in an abbreviated period—usually 15 months, the executive added. Their training allows them to find jobs and excel more quickly than does the worker with only a high school diploma.

“The college’s headline goal is to help students graduate and find employment. To do that, it must employ admissions representatives committed to their jobs.”

Enrollees find a diversity of course offerings and a focus and intensity not apparent at all institutions of higher learning. With an advisory board made of people in industry and business, the college offers students the training that the marketplace demands. Its programs race past traditional colleges that take breaks between semesters and during the summer, and its small size gives the career college the ability to expand and make changes to the curriculum as necessary.

Its broad array of accredited programs in high-demand fields include:

- **Healthcare** (medical and dental assisting, nursing, pharmacy technician and medical insurance billing and coding)
- **Business** (BA and BS degrees, as well as accounting and business management)
- **Health and wellness** (professional massage and bodywork and personal fitness training)
- **Justice** (BS degree in criminal justice as well as criminal justice and paralegal training)
- **Design and technology** (graphic and web design and computer network administration)

Additionally, the college offers classes at times that are convenient to working students, including evenings. Its online programs cover business management, accounting, criminal justice and paralegal training as well as American history, computer fundamentals, general psychology, humanities, written communications, logic and critical analysis, and strategies for success.

The college’s headline goal is to help students graduate and find employment. To do that, it must employ admissions representatives committed to their jobs.





### QUICK FACTS

**\$700k**

the projected annual value of using PXT's Job Match Pattern

**69:1**

the ratio of return on investment

**\$800k**

additional savings resulting from reduced turnover

### Making use of the ProfileXT®

The relationship between Profiles International and the college's leaders began in 2003 when a national director of Profiles with experience in the career college field became acquainted with the president of the college. College officials now use the ProfileXT® with many positions and in all departments, including academic and career services, student services and financial aid.

Recent numbers reveal striking results when top managers at the college used PXT to help them hire admissions representatives—the professionals who amass a vast knowledge of how the college can help a student realize success and who translate that to enrollment.

PXT's unique job fit pattern has helped them determine which admissions representative applicants fit the position best. Using its top performing admissions specialists as models, college leaders developed a pattern to determine what skills and competencies the most successful workers possess.

After creating the pattern, managers decided that an 84 percent match of potential employees to it would give them the performance success they desired. Adhering to this figure has resulted in success. The college projects the annual value of using the PXT's Job Match Pattern with admissions specialists to be more than \$700,000. The return on investment ratio is 69 to 1.

College leaders also believe that using the Job Match Pattern helped reduce turnover by six admission representatives in 12 months, resulting in an additional savings of more than \$800,000. That figure factors in the cost of giving a low-performing representative multiple, expensive leads each month.

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# CASE STUDY

IDENTIFYING TOP PERFORMERS  
& CONTINUOUSLY IMPROVING  
THE SELECTION PROCESS



Insurance Industry

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53

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# ProfileXT<sup>®</sup> and CheckPoint 360<sup>°</sup>™

Identifying Top Performers and Continuously Improving the Selection Process Keeps Turnover Rate Below Industry Average



## AT A GLANCE

### CHALLENGE:

- Identify top performers
- Improve selection process
- Sustain a turnover rate below industry average

### SOLUTION:

Use ProfileXT<sup>®</sup> and CheckPoint 360<sup>°</sup>™ to determine which potential employees would drive success in their organization

### RESULTS:

The company began using ProfileXT<sup>®</sup> to pinpoint the characteristics that lead to top performance. With this information, they were able to determine which potential employees would drive success in their organization. The decision to use ProfileXT<sup>®</sup> has helped achieve enormous success and sustain a turnover rate that is significantly below its competitors.

Since June of 2000, a global insurance company and Profiles International have been engaged in a productive relationship to improve associate performance and reduce turnover. The people-oriented, global insurance company decided to take a stand against high turnover rates in the insurance industry by incorporating innovative profiling tools into their hiring practices. The company began using ProfileXT<sup>®</sup> to pinpoint the characteristics that lead to top performance. With this information, they were able to determine which potential employees would drive success in their organization. The decision to use ProfileXT<sup>®</sup> has helped achieve enormous success and sustain a turnover rate that is significantly below its competitors.

## Background

Founded in 1966, the global insurance company focused on developing a business that valued partnerships, innovation, and a sense of urgency. The founder set out to build a company that provides strong loss prevention and claims management solutions by hiring the best talent to deliver services to clients. With these core principles, the company has grown from a single office in the mid-west into the largest privately owned independent insurance broker in the world.

## Facing industry issues head on

From the beginning, the insurance company recognized the importance of their people and created an atmosphere of outward appreciation. As they grew, they acknowledged that their reach into the talent pool was expanding and that they were facing heavier competition on every front. The company needed to find more of the same great people that made their organization so successful, and decided that a new way of hiring was now required. Aiming to avoid the complications faced by their industry, they took initiative to circumvent the turnover problem by taking a proactive approach to Associate selection.

“This instrument gave us a snapshot of the potential employee that could not be obtained through traditional interviewing...the managers started to realize that they weren’t necessarily making the best hiring decisions when relying on instinct alone, and before long, they began to embrace the objectivity that ProfileXT® provided.”

## Fostering an entrepreneurial culture

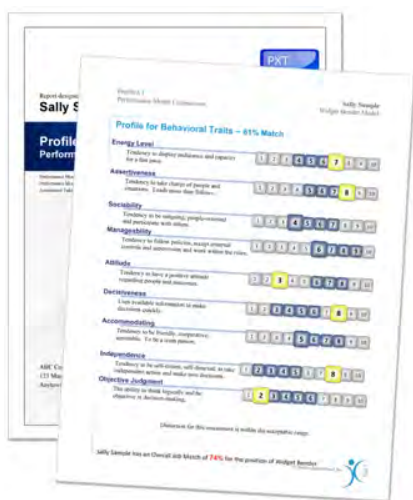
The culture at this global insurance company is truly entrepreneurial. Instead of being restricted by micro-management or complicated bureaucracy, their Associates are empowered to make decisions and devise solutions that maximize their individual opportunity and help grow the company. Traditionally, hiring managers at their company relied on their experience and instinct to select the best employees for new hire. They used word-of-mouth referrals and a “gut feel” to determine a candidate’s suitability for the company. However, as they grew, they couldn’t keep up with the staff gain by relying on referrals alone. The insurance company realized that it needed to provide hiring managers with the tools to help them select the right people to serve their clients. They decided to use ProfileXT® and CheckPoint 360™ to identify potential employees with the right mix of creativity and motivation to fortify their strong entrepreneurial culture. These tools have achieved great results by helping the insurance company build teams of driven, creative people who are independent thinkers and can contribute new ideas to the company.

## Finding the right people with ProfileXT®

ProfileXT® is a powerful assessment tool that measures an individual’s fit for a job and organization through 20 different dynamics. It considers the person’s thinking and reasoning ability, behavioral traits, interests, and aptitude. “This instrument gave us a snapshot of the potential employee that could not be obtained through traditional interviewing,” explains the Senior Vice President of Human Resources. “It was an adjustment for our hiring managers. Their mindset to this point was to rely on their instincts. They felt that they could tell whether an individual was suitable for their company within 10 minutes.” Yet the managers started to realize that they weren’t necessarily making the best hiring decisions when relying on instinct alone, and before long, they began to embrace the objectivity that ProfileXT® provided.

The global insurance company and Profiles International began by evaluating what made the company’s best performers so successful. Every company has a different mix of people, culture and aspirations; consequently, what makes a top performer at one company can be quite different from the next. A one-size-fits-all assessment would

These tools have achieved great results by helping the insurance company build teams of driven, creative people who are independent thinkers and can contribute new ideas to the company.



overlook their company's entrepreneurial culture and upbeat management style. Using ProfileXT®, they were able to directly identify what qualities were equated with top performance in their specific organization, creating a blueprint to follow for future hires.

Another important aspect of the assessment lies in its ability to separate the distinct qualities required for different roles. For example, the insurance company's entrepreneurial culture requires people throughout the organization who are creative and independent; however, the characteristics of a successful broker are different from those of a successful manager. ProfileXT® analyzes the key qualities that lead to accomplishment in these various roles and allow them to put the right people into the right positions.

**ProfileXT® gives this insurance company key advantages including:**

- 1. Finding people that fit with their culture:** Entrepreneurial culture requires a specific mindset. Where most assessments would likely screen out these top performers due to atypical characteristics, ProfileXT® uses their winning characteristics to build the ideal job profile.
- 2. Standardizing the hiring process:** With locations dispersed around the world, the global insurance company uses ProfileXT® to eliminate much of the guesswork in their hiring process. They get a clear picture of what works for their organization, its culture, and its clients. With this insight, hiring managers have the crucial advantage of foresight and can make solid, intelligent selections to fortify their company's success.
- 3. Strengthening and transferring company values internationally:** International organizations face the unique challenge of merging organizational and regional culture. ProfileXT® aids the global insurance company's international hiring managers in selecting associations that will reinforce its core values anywhere in the world.





## QUICK FACTS

**1.6%**

the company's turnover rate of professional-level employees-- well below the industry average of 10%

## CheckPoint 360<sup>o</sup>™ Feedback System

As a result of its success with ProfileXT<sup>®</sup>, the global insurance company has expanded its use of Profiles International's assessment tools to include the CheckPoint 360<sup>o</sup>™ Feedback System. This instrument provides professional guidance to associates who may have difficulty interacting with coworkers. It highlights areas upon which to focus and provides online tools to help associates obtaining training in their areas of opportunity. The global insurance company continues to explore new ways in which the CheckPoint 360<sup>o</sup>™ Feedback System can provide additional value to the company.

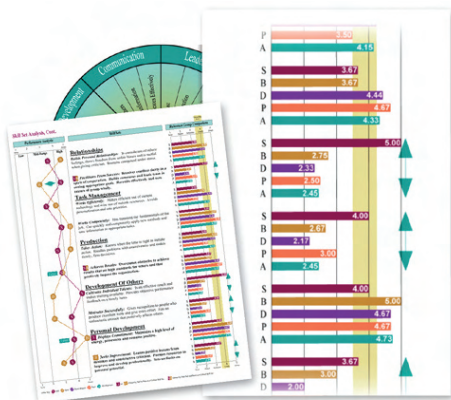
## Results

Currently, managers at the company are more confident in their hiring decisions than ever before. They have replaced a sheer "gut feel" with a more objective, reliable process that can help them evaluate the likelihood of success in the company's environment.

The global insurance company can confidently say that they hire great people. Their voluntary turnover rate of just 6% is well below the 10% industry average. Furthermore, professional-level employees, representing a substantial portion of the company's talent and investment, show a turnover rate of only 1.6%. They attribute their success to a combination of their excellent employer reputation and putting the right people into the right jobs with ProfileXT<sup>®</sup>.

## Looking toward the future

Their insurance company continues to use the tools such as ProfileXT<sup>®</sup> and CheckPoint 360<sup>o</sup>™, to continually improve their selection process. The Job Match Profile allows the company to replicate great hires again and again, based on the underlying qualities that make a person right for a particular position. As they grow and change, they can recalibrate the Profile, setting new benchmarks and refining the selection process even further.





With Profiles assessments available in over 30 languages, the insurance company will be able to use these tools almost anywhere in the world, building international teams that continue to strengthen and grow their highly reputable organization.

The insurance organization is a global company with international offices in 51 countries. Working with multinational teams presents its own challenges, finding divergence between organizational and national culture or, aligning newly hired employees to the existing culture. For this reason, the company is expanding its use of ProfileXT® to international locations. With assessments available in over 30 languages, the insurance company will be able to use these tools almost anywhere in the world, building international teams that continue to strengthen and grow their highly reputable organization.

### Summary

The global insurance company is determined to be a world leader in the insurance industry for decades to come. The company values its relationship with Profiles International and looks forward to future improvements as it continues to experience success from its remarkable people. Today, the insurance company knows what works for which jobs, what identifies top performers, and which people will be most likely to succeed in their entrepreneurial culture. Through its continued focus on the people who make it successful, this global insurance company will be ready to take on any challenge.



# CASE STUDY

REDUCING TURNOVER  
WITH STEP ONE SURVEY II®



Human Resources Staffing Industry

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# Step One Survey II®

## How Profiles' SOSII Dropped Turnover at Three Organizations



### AT A GLANCE

SOSII gives managers a structured, objective system to obtain better information, identify the best candidates, and conduct better interviews. Further, it helps organizations reduce hiring risk in a rapid yet careful and cost-effective manner.

Three organizations faced unchecked turnover that affected entire workforces. Open positions in these organizations required other workers to carry more of the load; some workers shut down or quit from the stress. Customer service was affected, as workers' ability to process orders decreased and newly hired workers were pressed into service with minimum training.

Here is a look at how leaders realized a significant drop in turnover after using Profiles Step One Survey II®:

### Case study 1:

A commercial janitorial service with high-profile clients like banks and other commercial buildings saw staffing requirements grow with its success. The problem was both a blessing and a curse. The service needed

more workers, but finding the right workers who would not be out the door after a short period of time was a challenge.

Supervisors turned to Profiles' SOS II assessment as a pre-screening instrument. After 18 months, the service's staffing level had increased by 4 percent. Simultaneously, the number of assessments required to screen new hires dropped by 67 percent.

- ▶ **Reason for the assessment decrease:** Reduced turnover, leading to fewer job interviews and a decreasing need for pumping in new hires to maintain staffing levels.
- ▶ **Result for the organization:** Employee retention, resulting in better training.
- ▶ **Benefits for the organization's customers:** Quality work provided by reliable employees.

### Case study 2:

A small professional staffing agency needed quality workers for medical and dental office placements. Its challenge was a 17 percent worker failure rate, which was damaging to its reputation and daunting to the budget, as hiring costs spiraled. Leaders turned to SOS II and monitored its effects. After four months of screening applicants with the assessment, it noted that worker failures were reduced to 6 percent.

- ▶ **Benefit of using the assessment:** An estimated \$198,000 savings, using the cost of \$3,000 for each worker (66) who did not fail. Cost of using SOS II, including staff time to administer and score the assessment: \$12,000 a year.

The company needed more people immediately, so it relaxed its hiring criteria. The problem was a common one – reduced supervision in the face of great success.

### Case study 3:

A manufacturer realized explosive growth in demand for its products. It was already using SOS II, but it needed more people immediately, so it relaxed its hiring criteria. The problem was a common one – reduced supervision in the face of great success.

Before loosening its hiring criteria, the manufacturer started using SOS II when it noted that 51 percent of its workers failed to complete even six calendar months of employment with the company. After using the assessment and deciding not to hire candidates who scored a 3 or less, leaders reduced turnover to 29 percent – even when hiring 53 percent of all candidates.

Then, hiring standards relaxed as the manufacturer needed more employees. Hiring managers looked at what was happening, and decided to add a professional recruiter to the HR staff. As 78 percent of applicants were hired, the six-month failure rate grew to 49 percent. After the recruiter came in, 174 applicants were hired and 76 failed the six-month test – a failure rate of 44 percent, while the percentage of applicants hired dropped only by 2.

After the recruiter had been on the job only a month, turnover dropped. Only 38 percent of the people she hired left early; meanwhile, the percentage of applicants she hired went up to 81.

► **Result of using the assessment:** The data spanned three years and several methods of operating, including a large drop in turnover after the organization started using SOS II and before it relaxed hiring standards. Even though turnover increased in the face of looser hiring standards, three years of data in different hiring situations show a consistent relationship between systematic use of SOS II scores and successful hiring.

### What the Step One Survey II® can do

The assessment is scientifically designed to evaluate, early in the candidate-selection process, a job applicant's work-related attitudes in four areas: integrity, substance abuse, reliability, and work ethic. SOS II gives managers a structured, objective system to obtain better



information, identify the best candidates, and conduct better interviews. Further, it helps organizations reduce hiring risk in a rapid yet careful and cost-effective manner.

Answers to SOS II questions can reveal how a prospective candidate looks at such behaviors as unauthorized use of the Internet; using company email for personal communications; disclosing private computer data; theft of office supplies and other company property; clocking in or out for other employees; discussing confidential information and/or trade secrets to outsiders; shoplifting or inventory shrinkage; carelessness on the job; unexcused absences; tardiness; drug use; mediocre performance; fraud; and job-hopping.

Conversely, it encourages “an honest day’s work for a full day’s pay” by modeling, through its questions, the positive employee behaviors of promptness, confidentiality, employee loyalty and increased productivity.

Reports from the assessment go to the hiring manager, who sees a score based on the applicant’s responses to the four questions about integrity, substance abuse, reliability and work ethic. The report provides the managers with suggested interview questions to clarify areas of concern. SOS II takes an applicant about 20 minutes to complete. He can finish it online or by using pencil and paper. Managers are able to see the scored results immediately, which means the SOS II can be easily incorporated into the hiring process.

### What Step One Survey II® clients say

Says one leader: “Step One Survey II® ensures that all our managers are following the same hiring procedure. I like the fact that the questions are provided in a specific format. We also found that using this tool is a much better judge of honesty or integrity than when our managers rely on gut instinct.”

From the general manager of the janitorial service described above: “Thanks for all your help in our hiring process. It has made a tremendous difference in quality, reliability and customer satisfaction. We have received numerous comments from customers regarding the quality of individuals we hire for their sites.”





# CASE STUDY

IDENTIFYING  
TOP-PERFORMING  
SALES PEOPLE



Medical Device Distribution Industry

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# ProfileXT®

## In Use at a Medical Device Distribution Organization

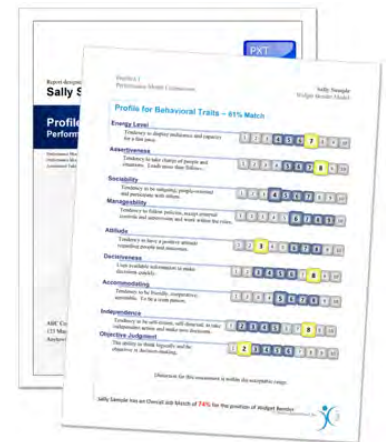
### Background

A medical device distribution organization hired Sales Associates to sell medical devices and experienced varying levels of success. While some Sales Associates were productive in the position, others were not. The organization wished to use the ProfileXT® assessment to aid in candidate screening. Presented with this situation, a study was conducted to examine the relationship between Sales Associate performance and their scores on the ProfileXT®.

The organization more than doubled its sales revenue simply by selecting those candidates who possess a similar pattern of traits to those who are already successful in the position.

### Participants

Ten Medical Device Sales Associates participated in the study. Each Associate completed the ProfileXT® and had their sales performance evaluated by the medical device distribution organization. Based upon the annual sales information supplied by the organization, four Sales Associates were identified as Top Performers and six were identified as Bottom Performers.



### Job Match Pattern

Using a Concurrent Study format, a Job Match Pattern was developed for the Sales Associate position using the Sales Associates' scores on the ProfileXT®. This pattern serves as the benchmark to which other candidates may be matched.

### Performance groupings

Using the annual sales data gathered from the employer, Profiles International built a pattern that described the traits of the existing Top Performing Sales Associates in the sample. All ten Sales Associates were matched to the pattern. After reviewing the results, an overall Job Match Percent of 90% or greater was found to best identify Top Performing employees. This Job Match Percent serves as the benchmark to represent a good match to the Job Match Pattern.



### AT A GLANCE

**This study demonstrated the pattern and effectively identifies Top Performers:**

- Top Performers correctly identified as Top Performers by the pattern: 4 of 4
- Bottom Performers incorrectly identified as Top Performers by the pattern: 0 of 6

Of the ten Sales Associates in the sample, only four achieved a Job Match Percent of 90% or greater. All four of the Top Performing Sales Associates in this sample met or exceeded the 90% Job Match Pattern breakpoint while none of the Bottom Performers achieved the same 90% breakpoint.

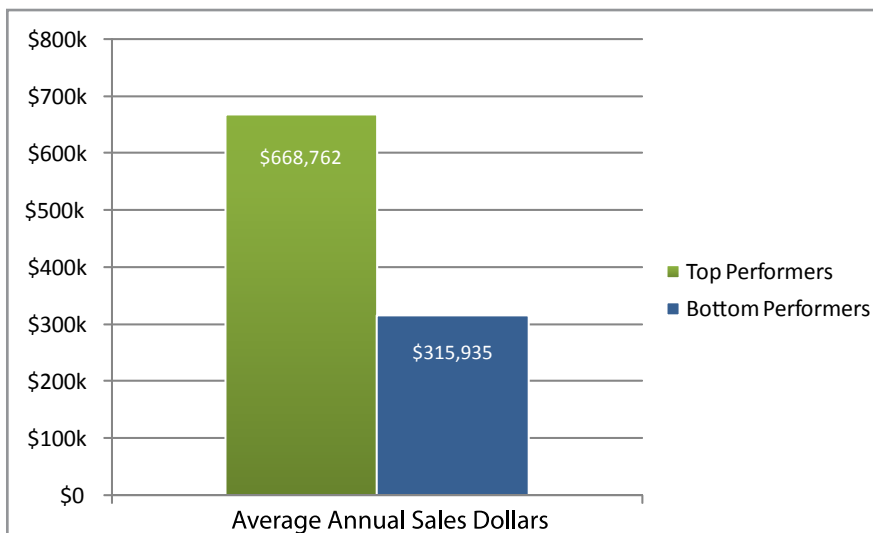
### Details

The annual sales dollars generated by the four Top Performers in the sample averaged \$668,762. During the same sales period, the Bottom Performing employees in the sample averaged \$315,935 in sales. The Top Performing Sales Associates in the study averaged \$352,828 more in sales than the Bottom Performing employees; more than double the average total sales earnings of the Bottom Performers. Additionally, this pattern has done an excellent job distinguishing the Top Performing Sales Associates from those who are Bottom Performers. In the sample, all Top Performers met or exceeded the Job Match pattern bench mark while none of the Bottom Performers were able to achieve the same breakpoint.

### Summary

The efficacy of the Job Match Pattern is evident; all four of the individuals who met or exceed the 90% Job Match pattern benchmark were Top Performers, while all six individuals who did not meet the same mark were Bottom Performers. Moreover, by being able to better screen Sales Associate candidates, the medical device distribution

organization more than doubled its sales revenue simply by selecting those candidates who possess a similar pattern of traits to those who are already successful in the position. Thus, the well-matched Sales Associate candidates are also more likely to enjoy success by being a good fit to the position.









# CASE STUDY

REDUCING TURNOVER:  
TAKING ASSESSMENTS TO  
THE NEXT LEVEL



Real Estate Industry

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# CASE STUDY

## REDUCING TURNOVER: TAKING ASSESSMENTS TO THE NEXT LEVEL

# ProfileXT®

## Reducing Turnover in a Top Real-Estate Firm: Taking Assessments to the Next Level



### AT A GLANCE

#### CHALLENGE:

- Reduce employee turnover

#### SOLUTION:

- Use the ProfileXT® assessment tool as part of the pre-hire screening process



### KEY TAKEAWAY

Pre-hire assessments help to improve hiring decisions and reduce employee turnover.

### Company overview

A top real-estate investment and trust company began its relationship with Profiles International in 2005, when its multifamily division decided to use the ProfileXT®<sup>1</sup> assessment tool as part of its pre-hire screening process. About 650 of the company's 1,000 employees work in that division. The aim was to reduce employee turnover, which runs at about 40 percent. The assessment tool is not used in other divisions at the organization.

The firm was established in 1993 and is valued at roughly \$5.5 billion. The company owns and operates retail shopping centers and office properties, but focuses primarily on the multifamily industry, of which it owns and operates more than 200 properties. The corporate headquarters is located in Birmingham, Alabama, and its holdings span much of America's Sun Belt, from Virginia to Florida and as far west as Nevada.

In the years since initiating its assessment program, the real-estate investment firm has kept its focus for the ProfileXT® (PXT) solely on guiding hiring decisions. The real-estate industry has been weathering hard times and that has included many layoffs for the company. That made it a priority for its HR department to focus on other matters, as opposed to initiating or expanding many special projects. But now that business is starting to turn around, the firm is looking ahead – and beginning to mine the PXT's potential for succession planning.<sup>2</sup>

### The hiring process

The organization has an applicant tracking system that lets job candidates (both internal and external) express interest in open positions online. That online assessment tool links applicants for positions in the multifamily division to a Profiles International site, at which they complete the PXT assessment in order to proceed.

<sup>1</sup> The ProfileXT® (or PXT) is a multipurpose assessment often used in pre-hire screening processes. It helps companies to develop a profile of the ideal candidate for a given position, so they can compare profiles of actual employees and candidates against that ideal. Source: [www.profilesinternational.com](http://www.profilesinternational.com).

<sup>2</sup> "Succession management" is a strategic and systemic process for creating successors at many levels of the organization, including non-managerial roles. Succession management refers to an organization's processes for identifying, selecting and managing successors, as well as the processes of career planning and talent migration.

# CASE STUDY

## REDUCING TURNOVER: TAKING ASSESSMENTS TO THE NEXT LEVEL



### KEY TAKEAWAY

The ProfileXT® helps companies to identify relevant characteristics of top-performing current employees as a basis for ideal profiles.

“By implementing the PXT assessment on the very front end, the recruiting team hopes to funnel information to the hiring manager to make the best hire for their openings.”



### AT A GLANCE

Training helps managers to interpret assessment results and guides their choices regarding what questions to ask during job interviews.

Depending on the position being applied for, a different assessment is completed. The assessments were developed in partnership with Profiles and are based on patterns for eight different positions. The PXT helps companies to identify relevant characteristics of top-performing current employees as a basis for ideal profiles.

It is noteworthy that the firm uses the PXT at the start of the application process; no applicants are screened out prior to that point. This means that, while the organization hired roughly 300 people in the multifamily division last year using assessments, many more assessments were logged. *(Different Profiles International clients choose to administer assessments at different stages in the hiring process.)* By implementing the PXT assessment on the very front end, the recruiting team hopes to funnel information to the hiring manager to make the best hire for their openings.

### Guiding decisions, not dictating them

The company is laying a good foundation for the use of the PXT in other talent processes (such as succession planning) by asking all employees to complete an assessment. Doing so not only helped to guide the creation of ideal profiles for use in hiring decisions, it generated a wealth of data about the current workforce. Such data can help decision-makers immensely when it is time to identify which employees might be best-suited for promotions. This type of data also indicates the level of bench strength<sup>3</sup> for key positions within the organization.

But widespread use of assessment tools can raise concerns among employees if companies do not take care to communicate their purpose in an unthreatening way. As part of the organization's change management strategy, it presented the process of gathering assessment information as both an effort to provide managers with a tool for better understanding employees' strengths and weaknesses, as well as simply a matter of keeping thorough records.

That message is an honest match for how assessments are used at the real-estate investment company. Because even though the information is regarded as valuable, hiring managers have the final word on who gets hired for which position.

<sup>3</sup> "Bench strength" refers to the capabilities and readiness of potential successors to move into key professional and leadership positions.

# CASE STUDY

## REDUCING TURNOVER: TAKING ASSESSMENTS TO THE NEXT LEVEL

Hiring managers receive training by the recruiting department on the PXT, including a discussion of statistics which show that employees who come closest to these ideal profiles are most likely to stay with the company. The training (via a class, called “Talent First”) also covers how to interpret assessment results and helps guide managers’ choices regarding what questions to ask during job interviews. But when it is time to make a decision, the managers are not prevented from hiring candidates with low scores on the assessment if they see fit.

Also, there are some managers who have not been fully trained to use the tool. In those cases, if a hiring decision is made, the company has no wish to backtrack and tell a new employee that he / she is ill-suited for the position.

The PXT is one input to the hiring decision. If the hiring manager decides to hire an employee who is not evaluated as a good fit, the information from the assessment is not lost. These data provide valuable insights to the hiring manager in order to develop a plan that will increase the new employee’s success in the role – data the manager would not have had otherwise.

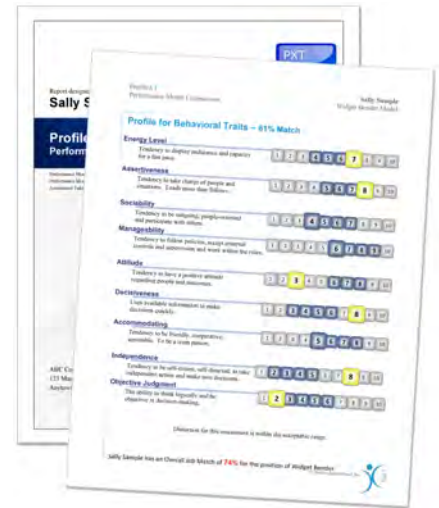


Figure 1: Job Match Percentages – Active Employees Versus Terminated Employees



Source: Profiles International, 2010

## Results

As indicated in Figure 1, the use of the ProfileXT® has proven to be quite successful. The trend of the overall percentage match of those who are hired and still remain employed after 12 months is represented by the green arrow. The trend of the overall percentage match of those who are hired and terminated in the same year is represented by the red arrow.

In summary, the higher the overall percentage match to the performance model, the greater possibility that the person will stay in the position for more than 12 months. In 2008, an update was made to the job profile based on the data from previous years that related to tenure and performance. Those job pattern changes made a substantial impact on the retention rates and became a differentiator for tenure.



### KEY TAKEAWAY

Employees who gain greater self-awareness about their strengths and weakness from assessment results can set career goals that play to their strengths.

“These data provide valuable insights to the hiring manager in order to develop a plan that will increase the new employee’s success in the role – data the manager would not have had otherwise.”

## Looking ahead: Career development and succession planning

In the past, the organization has not communicated assessment results to individual employees in any systematic way. The results have been used more as a tool for managers.

But the real-estate investment firm does see value in letting employees tap into the information that assessments can provide. For example, employees who gain greater self-awareness about their strengths and weaknesses from assessment results can set career goals that play to their strengths.

To help with this aspect of employee development, the company has begun to learn information about individual employees’ interests and hopes, as well as information from performance reviews. The organization wants to share where those interests and hopes and proven capabilities align with PXT data.

Alignment information will be shared with executives to help them maintain a sense of where the most potential and the most ambition for advancement lie within the organization. Executives are excited by the prospect of getting more value out of assessments they already use and further leveraging the assessments to help them chart a hard-won future.







# CASE STUDY

USING THE CHECKPOINT 360<sup>™</sup>  
TO BUILD LEADERSHIP AND  
EMBRACE GROWTH



Retail Industry

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# CASE STUDY

USING THE CHECKPOINT 360<sup>o</sup>™ TO BUILD LEADERSHIP & EMBRACE GROWTH

## CheckPoint 360<sup>o</sup>™

Using the CheckPoint 360<sup>o</sup>™ To Build Leadership and Embrace Growth



### AT A GLANCE

Assessments of managers against expanded roles uncovered specific skills gaps and enabled a targeted development solution to be created.



### KEY TAKEAWAY

Pre-hire assessments help to improve hiring decisions and reduce employee turnover.

### Background

This company marked a milestone this year, completing the merger with what had been its largest rival. The newly merged company employs 20,000 team members and operates more than 500 locations in the United States and Canada. These “one-stop shops” provide an array of sundries, from food and fuel to bathroom facilities and electronics – and restaurants are integrated into all of the operations.

In preparing for the merger, the company’s learning and development (L&D) organization recognized a need to prepare multi-unit supervisors for a substantial increase in the size and scope of their responsibilities. The team also recognized that, while company leaders were happy to support and invest in a special training event, the approach would need to be focused, efficient and cost-effective to align with a financially focused corporate culture.

The solution developed is a two-and-a-half-day Human Resource Planning (HRP) workshop for selected multi-unit managers. The workshop, held at the company’s Corporate University spotlights how the multi-unit managers’ jobs are changing and the shift in skill sets needed. It also produces a learning plan for each participant, and it uses Profiles International’s CheckPoint 360<sup>o</sup>™ assessment tool to guide the way.<sup>1</sup>

### Getting started with the tool

The company’s L&D team leader considered several assessment vendors before choosing Profiles International. In the end, she felt that the competencies measured by the CheckPoint 360<sup>o</sup>™ aligned most closely with the competencies that the company values. She liked the graphics that assessment reports incorporate, making reports easier to understand. In addition, she appreciated the support that Profiles offers to make the tool easier to administer. Alignment, ease of use and support are among the factors any organization should consider in selecting an assessment tool.

<sup>1</sup> The CheckPoint 360<sup>o</sup>™ is a tool that assesses an employee in terms of 18 competencies, using feedback from peers, supervisors and direct reports, as well as the subject himself. Find more information on this tool and others at [www.profilesinternational.com](http://www.profilesinternational.com).

# CASE STUDY

## USING THE CHECKPOINT 360<sup>o</sup>™ TO BUILD LEADERSHIP & EMBRACE GROWTH



### KEY TAKEAWAY

Using a third-party provider to administer 360° feedback ensured anonymity for sources of feedback, which encourages candor.



### BEST PRACTICE

The participants, boss, boss's boss and an HR representative collaborate directly on a learning plan that takes assessment results into account.

For example, Profiles largely handles the process of collecting feedback on each workshop participant from up to 19 subordinates, peers and supervisors. Learning leaders simply provide the names and email addresses for all sources of feedback — and Profiles takes it from there, keeping the company informed of progress and flagging any sources of delay, such as out-of-date contact information. This kind of separation between the company and the vendor during the data-collection process is generally considered a best practice. By relying on a third party, companies help to assure anonymity for sources of feedback and encourage candor.

#### ► Before the workshop: Laying a foundation of understanding

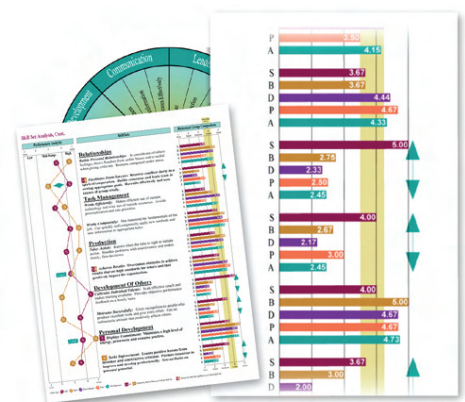
As mentioned, each multi-unit manager who is invited to participate in an HRP workshop goes through a CheckPoint 360<sup>o</sup>™ assessment in advance. That means that up to 19 of the manager's subordinates, peers and supervisors provide feedback on the manager's performance with regard to 18 competencies.

Next, the manager receives a generic CheckPoint 360<sup>o</sup>™ report to show the kinds of information that the assessment will generate. With the sample in hand, the manager views a webinar that Profiles International has created to explain the assessment process and how to interpret results.

It's worth noting that these efforts at orientation and explanation come before the manager receives his or her own results. The delay is intentional, aimed at ensuring that managers focus on understanding the assessment objectively *before* personal information enters the picture.

#### ► During the workshop: Using results to plan development

Individual results are delivered to the hotel at which participants stay during the workshop, on the day before group activities begin. This allows participants to have an evening to review the feedback alone. Also, initial workshop activities focus more generally on job descriptions, skill sets and how they are changing, allowing a bit more time before workshop participants are asked to discuss their results.



# CASE STUDY

USING THE CHECKPOINT 360<sup>™</sup> TO BUILD  
LEADERSHIP & EMBRACE GROWTH



## KEY TAKEAWAY

The training and assessment aim to encourage and enhance continued good performance, to the benefit of both the company and the managers themselves.

“It took (us) having one-on-one live conversations with the first group of attendees, saying, ‘This is not a bad thing. You’ve been selected because you’re good!’ ... But once they came through, and other region managers and field support started seeing what was happening, the tide really changed. Now, people really do want to come.”

Meanwhile, several other key people receive and review each workshop participant’s assessment results. This group includes the L&D team leader and the HR vice president, as well as the participant’s boss, his/her boss’s boss and HR representative. Later in the workshop, the L&D team leader conducts a session on using feedback to realize leadership potential. Then the aforementioned boss, boss’s boss and HR representative join the workshop to collaborate directly with the participant on a learning plan that takes assessment results and other aspects of the workshop curriculum into account.

### ► After the workshop: Following through

Much effort goes into ensuring that lessons learned during the workshop don’t, as the learning team leader put it, “die a quick death.” Follow-up measures help reinforce instruction and help workshop graduates continue to pursue their goals after they return to the field.

For example, 30 days and 60 days after the workshop, the L&D team leader conducts conference calls with participants to check on progress and identify any unmet support needs. Separately, each participant’s boss and HR representative also touch base with him/her. Also, attendees form their own peer accountability group and hold calls once or twice a month to help one another stay on track.

As an additional follow-up measure, L&D leaders hold quarterly webinars for all workshop graduates. The L&D team has developed worksheets and study guides to accompany these webinars.

## A change management challenge

As you consider this company’s experience with the CheckPoint 360<sup>™</sup>, it’s worth noting a change management challenge that the company overcame – helping employees get comfortable with the idea of being rated by their colleagues.

Multi-rater assessment tools (often referred to generally as 360s) can be unsettling in some organizations because of how they have been used in the past. Too often, leaders pull out 360s only to support decisions already made about employees who are falling short of expectations and may be fired. When asked to be the subject of a 360, even top performers might experience a moment of fear as they wonder, *Am I on my way out?*



# CASE STUDY

USING THE CHECKPOINT 360<sup>®</sup>™ TO BUILD  
LEADERSHIP & EMBRACE GROWTH

I do believe that the (assessment) and the feedback that workshop participants got, and the awareness that was brought to each and every one of them, has helped to prepare them for going on to bigger and better roles.

This learning leaders' plan was much more in line with Profiles International's intention for the CheckPoint 360<sup>®</sup>™; it was designed to guide leadership development, not to validate poor performance or block career paths. Managers chosen to participate in HRP workshops are already considered promotable up-and-comers. The training and assessment aim to encourage and enhance continued good performance, to the benefit of both the company and the managers themselves.

The learning and development team leader recalled: "It took (us) having one-on-one live conversations with the first group of attendees, saying, 'This is not a bad thing. You've been selected because you're good!' ... But once they came through, and other region managers and field support started seeing what was happening, the tide really changed. Now, people really do want to come."

## Results and next steps

The company held its first HRP workshop for managers in September 2009. Of the first group of 17 participants, roughly 35 percent are currently in the running for promotions. L&D leaders don't suggest the workshop deserves full credit for this — the participants were strong performers from an operational standpoint before the workshop was even created. But growing eagerness among other managers to go through the workshop and general enthusiasm regarding the effort suggest its value is clear among its target audience.

So far, that target audience has been regional managers, and by year's end a total of about 70 will have participated in five workshop events. Upcoming events are also starting to include selected individuals from the company's headquarters, such as a corporate attorney. Employees brought into the company through the merger may be among the next in line. Learning leaders hope that as participation grows, workshops can help promote a culture where self-awareness and continuous development efforts are second nature.

The L&D team leader said, "I do believe that the (assessment) and the feedback that workshop participants got, and the awareness that was brought to each and every one of them, has helped to prepare them for going on to bigger and better roles."







# CASE STUDY

HIRING PRODUCTIVE  
SALES PEOPLE



Sales Staff Industry

# ProfileXT®

## PXT in use by a sales organization



### AT A GLANCE

#### CHALLENGE:

A better way to select highly productive sales personnel

#### SOLUTION:

The company used the ProfileXT® to assess their sales staff and then conducted a study to determine the relationship between the PXT results and sales productivity.

A large nationwide sales company wanted a better way to select highly productive sales personnel. The organization used the ProfileXT® to assess their sales staff and then conducted a study to determine the relationship between the PXT results and sales productivity.

### Participants

The employer initially provided a list of the 12 Top Performers out of 41 total sales staff so they could develop a Job Match pattern based on their PXT results. The performance criterion was from an in-house evaluation process the company routinely used to assess the productivity of their sales people.

### Job Match pattern

The standard software was utilized to build a Job Match Pattern using the 12 Top Performers. This was accomplished by using the software's integrated

Concurrent Study process. The resulting Top Performer Job Match Pattern was used for subsequent job matching.

At that time, the company provided the performance ratings for all subjects. All 41 subjects were matched against the resulting Top Performer Job Match pattern, with a 79% or greater match selected as an acceptable matching point.



### Details

Of the 12 Top Performers identified by the employer, 11 (92%) matched the pattern at or above the matching point.

Of the 15 Bottom Performers (as identified by the employer), only 3 (20%) matched the pattern at or above the matching point.

Of the remaining subjects who were identified as performing in the middle range, approximately one-half matched the pattern at or above the matching point (selection rate, 52%). These ratios reflect the favorable selection capability of the pattern.



# CASE STUDY

RECRUITMENT, COACHING, &  
RETENTION WITH PROFILEXT<sup>®</sup>,  
STEP ONE SURVEY II<sup>®</sup>, &  
CUSTOMER SERVICE PROFILE<sup>™</sup>



Senior Healthcare Industry

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81

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# Recruitment, Coaching, & Retention

## Driving Home Success with PXT, SOSII, & CSP



### AT A GLANCE

#### CHALLENGES:

- Reducing turnover
- Recruiting good support staff
- Increasing retention

#### SOLUTION:

The organization relies on several assessments to help recruit support staff. Executives began with Profiles' Step One Survey II® and Customer Service Perspective™, and later incorporated ProfileXT® to help develop leaders.

#### RESULTS:

Since 2005, Profiles' assessments have helped the organization attain its goals through recruitment, coaching, and retention of the right employees.

In 2010, a health care organization in Kentucky won the designation of a "Best Place to Work"—no small feat for a company that more than tripled its size only four years earlier. Company leaders maintain steady operations by empowering workers through a philosophy of customer service that emphasizes respect for both employees and customers.

Since 2005, Profiles' assessments have helped the organization attain its goals through recruitment, coaching, and retention of the right employees. The results include a 41.2 percent drop in turnover during three years of matching workers to job roles, saving the organization more than \$2 million in hiring expenses.

### Background & company culture

The organization's ultimate mission is to provide high-quality senior housing and care services to residents. It operates in 15 states, and services range from assisted and independent living to skilled nursing, inpatient rehabilitation, and memory care.

The company embraces its roots in the assisted living area, and its history demonstrates leaders' steady approach to operations even during a period of rapid growth. In November 2006, its facilities multiplied almost overnight when four companies merged. "It happened quickly, but we absorbed and adjusted," the human resources manager for the assisted living division said.

The Louisville, Kentucky-based organization grew from 12 senior care facilities to 74, a number that encompasses 46 assisted living communities, 19 skilled nursing facilities, five multilevel retirement communities, and four rehabilitation hospitals.

When the companies blended, "there were opportunities for us to explore ways of merging," the assisted living executive, a 10-year veteran of the human resources field, said. "We tried to embrace the philosophy from each of the companies. At our very first annual meeting, we all came together and created the mission and values statements. We allowed each of the companies to share what was important to them, and then took those philosophies and made that one."



“Each position that we have at our company, we build a job pattern. The patterns are based on requirements and duties for that particular position on a daily basis. It’s a huge benefit for us to see the results because you can gather only so much data from an interview alone.”

The mission statement vows to enrich “the lives of the individuals who live and work with us by responding to their unique needs and universal desire for dignity and respect.”

Additionally, the organization committed to these values and stated them openly for all to see:

- Enriching the lives of each resident, patient and employee through teamwork
- Respecting each individual
- Promoting creative thinking and learning
- Leading and serving with humility
- Accepting and expecting accountability
- Providing compassion and kindness to our residents, patients and fellow employees
- Building trust by acting with integrity
- The passionate pursuit of excellent care and service.

This embodies the company’s culture, said the human resources executive. “It gives a good sense of who we are and what we hope to achieve through our associates and for our residents and customers.”

The organization’s facilities can be found in 15 states—Alabama, Arkansas, Florida, California, Georgia, Indiana, Kentucky, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, Virginia and West Virginia. Leaders maintain high standards of operation across a wide range of the country with strong regional support staff. For example, the assisted living division has four regions and includes a regional director of operations, a regional director of sales, and a regional director of marketing. “We rely heavily on our profile to select our support staff,” the HR executive said. “They travel on a weekly basis, and they are the ears and eyes of the support center.”

The practices of the company were recognized in 2010, when it was one of a handful of organizations in the state to earn the honor of “Best Place to Work in Kentucky” from the Best Companies Group. The judges based their decision on a review of employee policies and procedures and the results of an internal employee survey.



### QUICK FACTS

**41.2%**

drop in turnover during three years of matching workers to job roles

**\$2 million**

saved in hiring expenses as a result of reduced turnover

## Assessments used

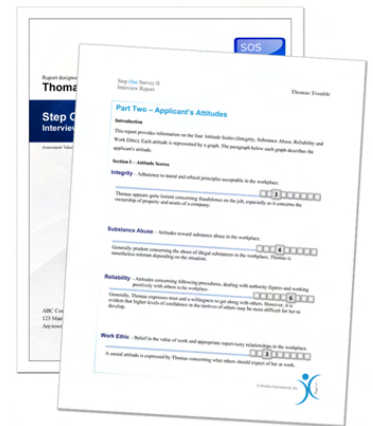
The company relies on several assessments to help recruit support staff. Executives began with Profiles' Step One Survey II® and Customer Service Perspective™, using them with workers in the original 12 communities. Once the merger took place, leaders expanded the assessments to the whole company. Since 2006, hiring executives have assessed 24,000 applicants. "The recruiting manager is diligent in requiring that any candidates for selection are profiled, and that the profile meets our standards," the HR executive said. Once a candidate meets the standards, he or she is referred to a hiring manager for an in-person interview.

Used correctly, the assessments steered both turnover and retention in the right directions—down and up, respectively, the HR executive said.

### ► Step One Survey II®

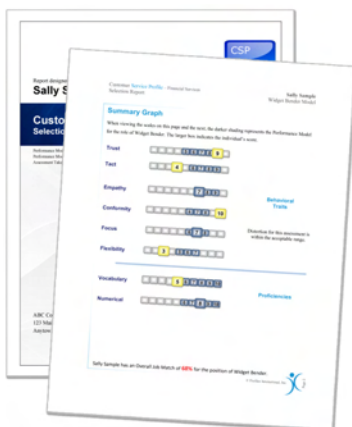
Appropriately nicknamed "SOS," this assessment gives insight into an applicant's work ethic, honesty, integrity, likelihood for substance abuse, and attitudes on theft—

including the theft of company time. It also provides a type of forecast of how well the candidate would blend in with office culture and climate. The assessment does this by measuring promptness, dependability, loyalty, and productivity, as well as conscientious use of company time, resources, and attitudes toward confidentiality of proprietary data and other information.



### ► Customer Service Perspective™

Communicating what good customer service looks like is easier when employees have the right attitudes. This is where the CSP helps. It assesses beliefs and customer service proficiency by measuring characteristics such as tact, trust, empathy, conformity, focus and flexibility. It also assesses skill level in vocabulary and mathematics and measures how each person's perspective on serving customers aligns with the organization's policies and attitudes.





### KEY TAKEAWAY

The assessments are helping the organization determine each job candidate's fit within the culture and alongside the position they are interested in. The job interview provides a subjective tool while the assessments provide an analytical, objective piece.

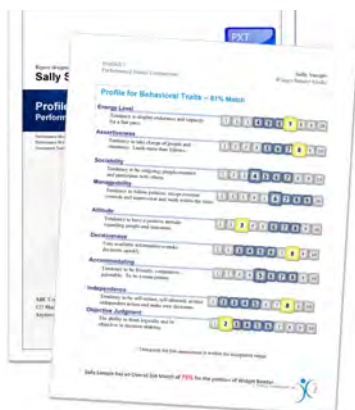
The CSP provides these reports:

- **Placement Report**— The Job Match Percentage tells how well job candidates match an organization's standards and the degree of alignment between a candidate's perspective and the company's perspective.
- **Coaching Report**— This reveals the areas in which individualized training/coaching will instill the attitudes an organization wants in all employees.
- **Individual Report**—Through heightened awareness, each employee gets the opportunity to improve his skills.

The health care organization's leaders encourage the management teams in each community to use reports from the assessments in the interview process. "The report provides us with questions to be asked," the HR representative said. "At the support center level, we use the reports to coach if we have management issues."

Customer service takes on an enhanced role in the organization's assisted living communities because employees play a unique role as "guests" in the residents' homes, the HR executive said. "We are ensuring that they have the proper care, the proper services, and their needs are met. We approach it more from a hospitality standpoint. It's very different from the skilled nursing world because most of our residents are fairly independent. They might need help with bathing or taking medications, but we are not a hospital setting. It's very important to us that we consider the fact that this is the resident's home, and we must provide a level of service that someone would provide when they come into our home."

Leaders are looking for ways of expanding the customer service conversation and ensuring that their customer service philosophy is projected through the CSP so that everyone hired shares the philosophy.



### ► ProfileXT®

After using the first two assessments to quell turnover issues, leaders of the company added ProfileXT® to its toolkit to help develop leaders. Some of the applications include:

- Conducting ongoing training to ensure compliance
- Conducting quarterly training for all new managers
- Reporting monthly on compliance and attrition
- Using the assessment for succession planning and coaching strategy
- Increasing resident satisfaction by addressing turnover



### KEY TAKEAWAY

## Summary

Since 2005, Profiles' assessments have helped the company attain its goals through recruitment, coaching, and retention of the right employees.

The results include a 41.2 percent drop in turnover during three years of matching workers to job roles, saving the organization more than \$2 million in hiring expenses.

## Summary

The assessments are helping the organization successfully determine each job candidate's fit within the culture and alongside the position they are interested in, the HR executive said. "Each position that we have at our company, we build a job pattern. The patterns are based on requirements and duties for that particular position on a daily basis. It's a huge benefit for us to see the results, because you can gather only so much data from an interview alone."

The job interview provides a subjective tool while the assessments provide an analytical, objective piece. "It's one of the many tools we have in our recruiting toolbox—a very valid tool," she added. "We have seen a difference in performance. It's a positive thing to see that, regardless of change, we have consistently had a decrease in turnover and increase in retention across the board."

Assessments and a dynamic management team that is open to embracing and sharing ideas each play a role in those positive changes, she said. "The philosophy and the culture that we are building are based on our mission and values. We have a very dynamic executive team, and that filters down to our community overall. This is not a dictatorship—our leadership team is very refreshing, open, and dynamic."

“We have seen a difference in performance. It's a positive thing to see that, regardless of change, we have consistently had a decrease in turnover and increase in retention across the board.”