

Quick Guide

The Executive Group 

Here is quick guide to show you how to use the **Sales Personnel Report**. Please refer to the User's Manual (under resources on our website) for additional information on interpretation.

The Sales Personnel Report is designed as a highly confidential Management Tool ONLY. The report is NOT designed for applicant feedback and should NEVER be shared in any way with the candidate or employee. The report should be kept in a separate folder, not the employee's personnel file.

Use the 5-Step process outlined in the Tips guide with the corresponding graphs on pages 9-11 that most closely fit the position.

Step 1 Areas of Potential Concern

This section is designed to help you spot any behaviors that could impact productivity and bring into question someone's ability to perform a specific job. Use this information to help carefully assess any potential hiring liability, decide whether to conduct a group interview prior to a final hiring decision, or obtain additional information by validating references to help make a more informed decision.

- **ONE** area raises questions about job fit and suitability
- **TWO** areas indicate a red flag – proceed with caution
- **THREE** or more areas may have too many difficulties to overcome – expand your search

NOTE: Having no areas of potential concern does not necessarily indicate a perfect fit.

Step 2 Performance Factors

The Performance Factors are made up of 4 characteristics as they relate to job performance, long-term success and commitment within an organization.

- ✓ Personal Responsibility/Self Control
- ✓ Workplace Coping Skills
- ✓ Interpersonal Skills
- ✓ Independence versus Accommodating

Scores of 5.0 or greater are recommended for most jobs
Scores of 4.0 are questionable for management or sales but may be acceptable in other roles.
Scores of 3.0 or less should be carefully evaluated in the context of the role.

Step 3 Reasoning and Problem Solving / Factor B

Factor B can be used as a quick measure of mental ability. The factor has shown significant correlations with performance in work settings.

- Scores of 7.0 or greater indicate a higher level of reasoning and problem solving abilities.
- Scores of 5.0 and 6.0 suggest an ability to function adequately.
- Scores of 4.0 or less should raise question as to whether the person has enough reasoning skills for most jobs, especially more senior level positions.

Step 4 Mean Scores for Key Areas

Composite scores for three job classes including Managers, Sales Reps and CSR's are listed on Page 8 of the Tips Manual. Refer to the job that most closely resembles the position you are filling. Remember these are recommended averages to evaluate your candidate in light of the requirements for the job.

Step 5 Individual Factor Evaluations

Compare your candidate's scores on each factor with the suggested ranges by job classification on Pages 9 -11 of the Tips guide. The individual scores provided here are suggested ranges for each position. They are merely a guideline to follow. First identify any scores outside a given range. Next, evaluate if the trait is essential and necessary to perform the role.

Further Investigation

When **ANY** scores are in question, further exploration is **HIGHLY** recommended. Spend additional time reviewing the report, conducting thorough background checks or checking with past supervisors regarding questionable areas.

If you need additional interpretation on a profile, Rick Tiemann is available to walk you through the process and give you more insight. This service will be billed at an additional hourly rate of \$150 per hour.

REMEMBER: Use a Balanced Scorecard Approach to determine job fit and suitability.

This report should **NOT** be the sole basis for denying employment or promotion. Your final decisions about candidates should be based on several sources of input to include:

- ✓ Resume and interview
- ✓ Skills and abilities
- ✓ Education and training
- ✓ Work history and background
- ✓ Validating references
- ✓ The Personnel Report

Customer Service

Our Customer Service Team has the tools to track and troubleshoot problems. Call us if you have questions. We normally process tests from 9 AM - 5 PM CST Monday through Friday. You should be receiving the Personnel Report within 24 hours after your candidate takes the assessment. If your report is not arriving timely please call our office. When you need to evaluate a candidate ASAP let us know and we will make every attempt to expedite the report for you.

Best of luck,
Sue Russell
General Manager

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