

Sun Select

Selection Guide and Rating Kit (for Field Managers' Use only)



Name of Recruit

Field Manager's (Recruiter) Name

NBO

CONTENTS

1. Profile Evaluation

Rating sheet on profile requirement of a recruit. Serves as guide on the ideal profile of a potential recruit.

2. Interview Guide and Rating

Behavioral interview guide; checks actual experiences of recruit based on minimum competencies required.

3. POPScreen

Profiling test which finds out general fit of the recruit to an insurance sales career or business.

4. Summary of Ratings

Table wherein ratings for all the selection activities are to be indicated.

5. Final Recommendation / Decision

Recommendation of each evaluator and final decision.

1. PROFILE EVALUATION

Name of Manager Evaluating _____

Date _____

CRITERIA	POINTS REFERENCE	ACTUAL POINTS
1. Monthly Income		
PhP 50,000 and Above	15	
PhP 20,000 to 49,999	10	
PhP 10,999 to 19,999	5	
2. Age		
36 - 45 years	10	
26 - 35 years	15	
21 - 25 years	5	
3. Civil Status		
Married / Single parent	15	
Widow / Widower / Separated / Single	5	
4. Educational Background		
Postgraduate Education	15	
University Degree	10	
Technical / Vocational School Graduate	5	
5. Recent Work experience		
Entrepreneur / Business owner	15	
Professional - Accountant, Lawyer, Engr, etc	10	
Sales (Networking / Direct Selling / Real Estate)	10	
Sales (Insurance)	10	
Sales (Employed)	10	
6. Management Experience	10	
7. Job Tenure Background		
Stayed with current and past employers for at least 3 years each	5	
8. Source of Recruit		
Advisor Referral	10	
Policyholder - Sun Life	10	
Personal Contact of the Manager recruiting	10	
TOTAL POINTS	100	

Rating References

80-100	Good potential for success, for interview
50-79	Acceptable, for interview
30-49	Maybe considered, please highlight potential for success (use space on the right)
Below 30	Not qualified

REMARKS: Use this space for comments if rating is below Acceptable

2. SELECTION INTERVIEW



Interviewer 1: Name & Signature

Date

Interviewer 2: Name & Signature

Date

Motivational Fit

What did you like best about your work with (latest employer)? Why?

What did you like the least? Why?

Why did you join (organization)? What benefit do you get from being a member of that group?

What type of career are you envisioning for yourself?

What motivated you to consider a career in Sun Life?

Behavioral Competencies

I. ENTERPRISING - identifies, creates and seizes opportunities to increase sales volumes

- A. Describe a proactive action you took to explore an opportunity to sell something.
What motivated you to take this action? What was the end result? How did you benefit from this action?

Situation / Task	Action	Result

- B. Give me an example of a time when you were able to see an opportunity to earn money.
How did you anticipate and what did you do? What was the outcome?

Situation / Task	Action	Result

II. ACHIEVEMENT ORIENTED – demonstrates sustained energy and determination in the face of obstacles to set and meet challenging targets; takes actions to achieve goals beyond what is required.

A. What is your biggest achievement so far? What steps did you take to achieve it?

Situation / Task	Action	Result

B. Tell me about a time when you were almost dissatisfied in finishing a project or a task.
What was it all about? What did you do to reverse the situation? What was the result?

Situation / Task	Action	Result

C. While you were at (previous company), what ideas did you suggest that helped the organization to be more successful?
What made you come up with that suggestion? What was the result?

Situation / Task	Action	Result

III. PEOPLE ORIENTED – is comfortable meeting new people; gets along and works productively with a wide variety of personalities; considers the feelings and needs of others; works in partnership with customers to understand and anticipate their needs and provides products and services appropriate to their needs

A. What experience did you have in trying to blend in with a team or group of people?
What did you do? What was the result?

Situation / Task	Action	Result

B. Tell me about some of the steps you have taken to establish long-term collaborative relationships with groups or individuals

Situation / Task	Action	Result

C. Describe a situation wherein you had to deal with a difficult person. Who was that person?
How did you handle it? What was the result?

Situation / Task	Action	Result

IV. INTEGRITY – maintains and promotes ethical and organizational norms in conducting internal and external business activities

A. Tell me about a time when your manager / supervisor / team leader asked you to do something that you didn't think was appropriate? How did you respond? What happened?

Situation / Task	Action	Result

B. Sometimes strict organizational policies make it very difficult to get our work done.
Tell me about a time when you had to bend a rule to get your work done more efficiently. What was the result?

Situation / Task	Action	Result

C. Give me a specific example of a time when you had to conform to a policy with which you did not agree.
What did you do? What happened?

Situation / Task	Action	Result

OBSERVABLE COMPETENCIES (Observed during the interview)**Communication**

Expresses thoughts, feelings, and ideas effectively in individual and group discussions; projects credibility and poise even in highly visible, adversarial situations; adjusts language to the characteristics and needs of the audience; consistently uses appropriate communication to convey direction, priorities and goals.

Presence / Impact

Creates a good impression, commands attention and respect; demonstrates an air of confidence; dresses appropriately; speaks with a confident tone of voice; maintains an attentive posture; responds openly and warmly.

Rating Reference (Interview)

Competencies	Very Poor					Poor				Average				Strong				Very Strong		
Behavioral	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Observable	1		2		3		4		5		6		7		8		9		10	

Actual Ratings (Interview)

Competencies	Assigned Points	Rating 1 (Interviewer 1)	Rating 2 (Interviewer 2)	Average Rating = $\frac{(\text{Rating 1} + \text{Rating 2})}{2}$
Enterprising	20			
Achievement-oriented	20			
People-oriented	20			
Integrity	20			
Communication	10			
Presence / Impact	10			
Total	100			

(Average Rating to be indicated in the Summary of Rating - Overall)

3. POPSCREEN RESULT: (CHECK ONE)

(80pts)	(20pts)	(Opt)	
Proceed	Proceed w/Caution	Redirect	Date

If **POPSCREEN** Result is either Proceed with Caution or Redirect, please use this space to write reason for recommendation to accept:

4. SUMMARY OF RATINGS (Over-all)

Competencies	RAW SCORE	X WEIGHT	= FINAL SCORE
Profile Evaluation		20%	
Interview		50%	
POPScreen Result		20%	
*Top 100 Survey (max of 100 pts)		10%	
TOTAL SCORE			


*1 point per name, maximum of 100 names

Rating Reference (Over-all)

80 - 100	Good potential for success, consider for training
50 - 79	Acceptable, identify areas for strengthening (please use space below)
30 - 49	May be considered, highlight areas for development and action plan (please use space below)
Below 30	Not qualified

REMARKS: Use this space for comments described above

5. FINAL RECOMMENDATION / DECISION*

Evaluator / Interviewer	Not Recommended (State Reason)	Remarks	Name and Signature of Evaluator	Date
Manager Candidate				
Unit / Sales Manager				
New Business Manager				
Regional Sales / Business Dev't Manager				
Cluster Head				

*The 1) Recruiter (MC / UM / SM) 2) New Business Manager, and 3) either the RSM or Cluster Head should write Final Recommendation / Decision.