



Financial Services Representative Solution

Fact Sheet

SHL.

Financial Service Representative – One Sitting

Assessment Fact Sheet

Overview

The Financial Service Representative solution is for senior-level professional positions in the insurance industry that sell life insurance to businesses and individuals on behalf of insurance companies. Sample tasks for this position include, but are not limited to: calling on policyholders to deliver and explain policies or suggest additions or changes; calculating premiums; customizing insurance programs to suit individual customers; seeking out new clients and developing clientele by networking; ensuring policy requirements are fulfilled; and conferring with clients to obtain and provide information when claims are made on a policy. Potential job titles that use this solution are: Life Insurance Sales Professional; Insurance Sales Agent.

Job Level	Professional
Job Family/Title	Insurance

Details

Average Testing Time (minutes)	44 minutes
Maximum Number of Questions	203 items
Number of Sitzings	One
Designed for Unproctored Environment	Yes
Question Format	Multiple choice

Knowledge, Skills, Abilities and Competencies Measured

Screening (Unproctored)

Sales Potential: This is a measure of the tendency to have a combination of sales skills and experiences that predict success in sales positions. This is characterized by: showing alternative solutions based on customer needs; directing conversations toward a commitment/order/sale; showing confidence even after a hard refusal/rejection; and striving to close a transaction every time. This is demonstrated by answering questions on a multifaceted measure relating to background, experience, and opinions.

Professional Potential: This component measures the tendency to have potential for success in the retail industry. This is characterized by scores that are derived from responses to questions regarding academic and social background, and aspirations concerning work.

Drive for Results: This is a measure of the tendency to take a leadership role within an organization. This trait is characterized by: taking pride in reaching difficult goals; enjoying a fast-paced lifestyle; having high self-confidence in his/her abilities; and taking charge in group situations.

Knowledge, Skills, Abilities and Competencies Measured

Self-Motivation: This is a measure of the tendency to be even-tempered and responsible in the workplace. This trait is characterized by: being dependable; behaving in accordance with high ethical standards; being optimistic; and remaining relaxed in stressful situations.

Business Acumen: This is a measure of the tendency to analyze and detect underlying themes when solving problems. This is a trait characterized by: visualizing future needs and problems; being creative and innovative when generating new ideas; systematically looking at data; and planning and organizing tasks.

Senior Sales Retention: This is a measure of background, experiences, attitudes and opinions that are associated with voluntary job tenure in senior-level sales positions. It is designed to assess a variety of factors that affect retention that are independent of job performance, and it is NOT included in the overall solution score. Rather, it is provided as an additional piece of information that may be considered along with the other scores that predict actual job performance.

Example Questions



Which of the following statements do you agree with most?

- a) ☐ You expect the people around you to demonstrate high ethical standards.
- b) ☐ You treat others only as you would like to be treated.
- c) ☐ People can easily trust you because you can tell them what they want to hear.
- d) ☐ It is sometimes necessary to be deceptive in order to influence someone.

When most people are exhausted from work, I still have energy to keep going.

I like taking charge.

Strongly Disagree Disagree Neutral Agree Strongly Agree

The on-the-job help I've gotten from supervisors I've had has been:

- a) ☐ outstanding
- b) ☐ very good
- c) ☐ good
- d) ☐ fair
- e) ☐ poor
- f) ☐ none of my supervisors has really helped me

Example Reports

Detailed Report: Insurance 5.5: Financial Services Representative - Short Form

RecruiterInterviewDevelopment

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Applicant Information

Name:

Application Date: Wed Oct 28 10:38:00 EDT 2009

Applicant ID: 12408787

Session ID: 005421421309561737

Library: Selection

This report is confidential and its contents are intended to assist in the prediction of an applicant's work behavior. If you would like more information about this interpretive report or other products that PreVisor offers, please contact your account representative.

Overall Score

Recommended ✓

Percentile

LowMediumHigh

3070100

Overall Score

69

Detailed Results

Percentile

LowMediumHigh

3070100

Sales Potential

44

Professional Potential

52

Drive For Results

81

Self Motivation

50

Senior Sales Retention

48

Score Interpretation

Sales Potential

This is a measure of the tendency to have a combination of sales skills and experiences that predict success in sales positions. This is characterized by: showing alternative solutions based on customer needs; directing conversations toward a commitment/order/sale; showing confidence even after a hard refusal/rejection; and striving to close a transaction every time. This is demonstrated by answering questions on a multifaceted measure relating to background, experience, and opinions.

The candidate may have had some history of previous sales experience. The candidate may understand basic sales strategies but may have some difficulty in implementing them. The candidate may be motivated initially and establish challenging goals, but may lose motivation over time and may revert to setting goals that are more within their reach.

Professional Potential

This is a measure of the tendency to have potential for professional success across industry type and functional area. This is characterized by scores that are derived from responses to questions regarding academic and social background, and aspirations concerning work.

This candidate's response profile concerning past achievements, social orientation, and work orientation is moderately similar to the profiles of highly effective professionals. The moderate match between the profiles suggests that this candidate is somewhat likely to be successful in a professional position.

Drive For Results

This is a measure of the tendency to take a leadership role within an organization. This trait is characterized by: taking pride in reaching difficult goals; enjoying a fast-paced lifestyle; having high self-confidence in his/her abilities; and taking charge in group situations.

The candidate is likely to be highly motivated to succeed. The candidate will generally set challenging goals for him/herself and others. The candidate is likely to be proactive in taking action.

Self Motivation

This is a measure of the tendency to be even-tempered and responsible in the workplace. This trait is characterized by: being dependable; behaving in accordance with high ethical standards; being optimistic; and remaining relaxed in stressful situations.

The candidate is likely to be able to control emotions in the workplace most of the time. The candidate will generally have a positive attitude and be somewhat optimistic about the future. The candidate takes responsibility for his/her actions most of the time and demonstrates moderate levels of professionalism.

Business Acumen

This is a measure of the tendency to analyze and detect underlying themes when solving problems. This is a trait characterized by: visualizing future needs and problems; being creative and innovative when generating new ideas; systematically looking at data; and planning and organizing tasks.

The candidate is likely to have or acquire good planning and organizing skills. He/she tends to be innovative and is open to using alternative modes of thinking. The candidate may learn quickly and well, and create strategies to build his/her business.

Senior Sales Retention

This is a measure of background, experiences, attitudes and opinions that are associated with voluntary job tenure in senior-level sales positions. It is designed to assess a variety of factors that affect retention that are independent of job performance, and it is NOT included in the overall solution score. Rather, it is provided as an additional piece of information that may be considered along with the other scores that predict actual job performance.

Compared to other candidates, the candidate is likely to have average job tenure in a senior-level sales position, assuming that job performance is at least adequate.

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