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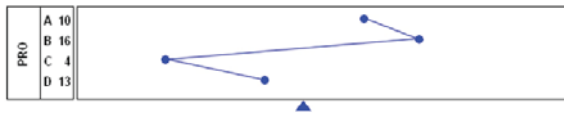
Developing a Range of Profiles for a Position

by Bob Wilson, *President*

I was involved in a project last month to determine the ideal profile for a Banking Branch Manager. I thought it would be helpful to share the complete process we went through in addressing this problem. It can give you a good idea of the types of things you could engage in with your consultant to help you determine the best range of profiles for any job within your organization.

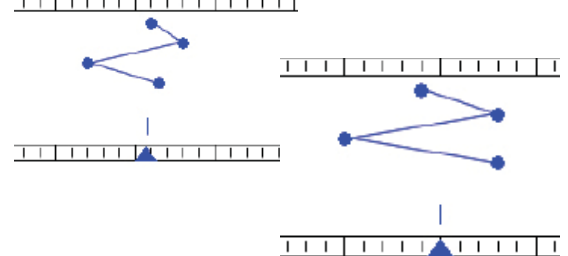
The client, a large bank, was looking to determine what profiles would work best as Branch Managers within their institution. They have used PI broadly for several years, but hadn't used it rigorously in their hiring process. Following a similar route would be a pretty good process to determine who would work best in specific jobs in your organization.

Step 1. The PRO Form. The first question I asked of their senior H.R. leader was, "Have you done a PRO form?" Being good PI clients, of course the answer was yes. That exercise yielded a Persuasive Sales / Management profile with a strong cutback D



That was a good start. But, it's only the start, especially when a company has a group of people already doing the job.

Step 2. Validity Studies within other organizations. The client asked if we had done validity studies on branch managers in other banks. There have been several validity studies done on Bank Branch Managers by PI Worldwide and the two most recent yielded variations of the Altruistic Server and Persuasive Sales / Management Profiles.



I cautioned the client that while these preferred profiles were the profiles of the ideal performers within specific banks, those banks may not and probably do not have identical measures of success to your bank. For example, is selling new clients a specific part of the managers' responsibility? Or, is their primary responsibility

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Are You in Wonderland? We Can Help

by Heather Haas, *Chief Operating Officer*

Crafting a vision for the future is important. It's the space between happenstance and intentionality. It's a stake in the ground that says, "We've made an intentional choice to do this and not that; or go here and not there; or be this and not that."

Consider the following excerpt from Alice and Wonderland between Alice and the Cheshire Cat.

Alice: Would you tell me, please, which way I ought to go from here?

The Cat: That depends a good deal on where you want to get to.

Alice: I don't much care where.

The Cat: Then it doesn't much matter which way you go.

Alice: ...so long as I get somewhere.

The Cat: Oh, you're sure to do that, if only you walk long enough.

Of course, it's silly to think one could arrive at an unknown destination or hit an invisible target. But organizations (and people, for that matter) do this all the time. The Cheshire Cat challenges us to think about whether the risk of "walking long enough" to "get somewhere" is worth it. Consider that *somewhere* may not be profitable, relevant, desirable or fun. *Somewhere* may actually be nowhere. Many organizations deprive themselves of the opportunity to continuously improve, evolve with purpose and actually accomplish their goals because they don't take the first step which is engaging their employees in crafting a vision for the future.

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compliance as evidenced by assurance that the drawers balance at the end of the day, week and month? Or, is success found somewhere in the middle? We need to determine what works specifically within your bank based on the criteria you value internally to determine the profile you're looking for in your candidates.

Step 3. Looking at the best performers.

One of the reasons we were brought into the situation was that the HR department at the bank had pulled the profiles of their top 10 branch management performers to try to see what the evidence would tell them. While the profiles of these people seemed to have more high B's than low B's, it was hard to pick up any real trend. They were stumped to find information in these 10 profiles that they could find helpful.

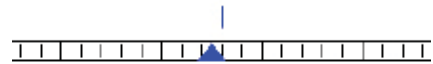
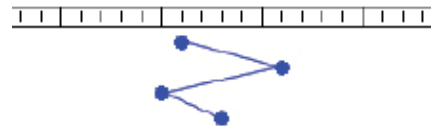
That wasn't surprising. **You can't tell what works only by looking at those performers who have succeeded. You need to compare the successful people doing a job with those who are equally unsuccessful and discover the points of variance in order to see the trends.**

Frequently, our hiring efforts without PI will succeed in picking up one aspect of a profile. For example, we might be good at finding high B in the interviewing process. The problem is that high B might not be the critical aspect of success in the hire. Perhaps a low C or a Generalist (higher A lower D outlook) is more relevant to success in a job than high B. Thus, you could find you had equally high numbers of high B's in your successful and unsuccessful performers because that's what you were screening for. This may be the factor you find in all of your top performers but might not be a critical success factor. *Looking at the best performers in a vacuum doesn't help you determine what you want to hire. You need to look at the marginal difference between your best and worst performers to determine whom you want to hire.*

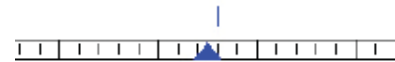
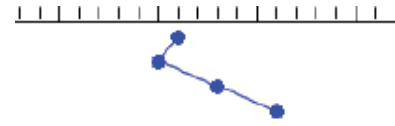
Step 4. Compare the best performers to the worst performers.

Prior to our meeting, I had asked the H. R. leader to pull together the book end set to their 10 best performers – their 10 worst performers; and analyzed these two groups prior to our session. This delineation allowed us to see the clear differentiations between the best and the worst performers. There were far more low B's and high C's in the worst group than there were in the best

group. While the best performers were all over the board, the average profile was a variation of an Altruistic Server



and the worst performer average profile was a craftsman



Now, we're starting to get somewhere. There's a clear delineation in profile regarding both the B and the C drives between the best and worst performers. But, that's not the place to stop. We still want to dig deeper into the data.

Step 5. Look at specific factors and factor relationships to see if the average profiles shave off valuable data in the process of creating "the average".

In this case, it's clear that high B and low C are preferable to their opposites. However, on further examination of the specific profiles of the two groups, the following was also noticed: 100% of the people whose profiles included high A, high B, low C and D higher to or equal than A were successful while 86% of those who were low A, Low B, D equal to or higher than A were in their worst performing group. While there weren't enough high A's and/or generalists in the sample to drive the average A in the profile of the successful group higher, people who were high A's had a higher likelihood of success than lower A's. 100% of the high A and high B's were successful, while 73% of the low A high B – the profile of the average in the best performing group – were successful! Likely, both would be viable hires – in terms of the odds of their success. We concluded that the target of hiring was to split the difference between the result of the PRO Form and the average of the best performing group. That is:

A. If you've got the choice, hire people who are high A, high B, low C and high D with A equal to or higher than D.

B. I'd also suggest they try some high A, high B, low C and cutback D profiles. That's what the PRO form suggests and they're likely worth experimentation.

Are You in Wonderland? We Can Help

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Conversely, having a vision doesn't, in any way, guarantee improved execution of anything, nor the achievement of results. Knowing where you want to end up has nothing to do with getting there. It has nothing to do with the challenges and surprises you'll encounter along the way, nor the research and planning that's required to actually map out the best route.

I have recently spent some time analyzing where our business falls along both the Vision and Execution continuums. Should you choose to do the same, I encourage you to contemplate the following.

- Perhaps you have a vision and/or a documented strategy, but you haven't realized the results you set out to achieve. Or, circumstances have taken you way off course.
- Perhaps the vision was YOUR vision and your people never bought in or weren't held accountable to work in new ways.
- Maybe you are operating without a vision but you have a set of core competencies that you've proven you can profitably execute. Is there a cost to not knowing what's next? Are you at risk of your value proposition becoming obsolete? Are you bored?
- Are leaders at all levels of the organization wrestling with these questions and engaging the hearts and minds of their people to help answer them?

Most companies have experienced a strategic planning event facilitated by a consultant where the team comes together for a few days at the local country club to create their mission, values and vision for the future. This is generally time well spent and people feel energized coming out of it. Then, however, it's back to reality where daily pressures and the demands of our jobs suck us back into fire fighting and survival mode. Mission statements and core values that reside in pretty frames on the wall are generally not top of mind for people on the front lines of getting product out the door, serving customers and hustling for business.

We, at ADVISA, know that. And that's why we stick with you well past the creation of your **Mission, Values** and **Vision** to build execution into the daily DNA of your organization.

To this end, our process continues with the creation of **One-Year Measurable Objectives** that serve as milestones for progress and as a framework for accountability. Our process also includes an **Organizational Talent Review** where we examine the current org chart in relation to your vision. We help you analyze the leadership pipeline, examine horizontal and vertical job fit and we challenge you to think about what future org design will be necessary to accomplish the vision. Most strategic planning processes ignore the "human architecture" of the organization which is what leads to "change management issues." Managing change is, very simply, managing people. Your people are the conduit to the successful execution of your strategic plan. In order to achieve your vision, your people have to work in new ways, adopt new paradigms and behave differently. Culture trumps strategy every time, hence why PI® data is absolutely critical to your organizational planning process.

Once we have carefully assessed the people and culture, we begin the process of integrating the 1 year objectives into the performance expectations at every level of the organization. We help you create **Key Performance Requirements** for your people that provide a line of sight to the larger organizational goals and objectives. And here's the best part, once all that hard work is done, your consultants is your long-term partner in helping you get where you want to go. We don't hop on a plane and say, "Good luck! Nice working with you."

So, wherever you find yourself - Wonderland, Blunderland or somewhere in between - we can help you make sense of it. Contact your consultant to discuss our Organizational Planning process. You'll be glad you did.



If you don't know where you are going, you are certain to end up somewhere else

- Yogi Berra



Upcoming Open Training Sessions

Three-day Predictive Index® Management Seminar

This session prepares managers and Human Resources Professionals to use the Predictive Index® System in hiring and managing within your organization.

Carmel, IN December 1-3, 2009

• Presented by Aszure Grimes

Carmel, IN January 26-28, 2010

• Presented by Chris Pauwels



The cost for these open sessions is \$1,885 per attending person. If you have 5 or more attendees, we will be happy to schedule a private session for your organization.



If you have someone you would like to sign up for one of these sessions, please call or email your consultant or Penny Pruett at 317-249-2249 or ppruett@advisausa.com.

The 6th Michigan PI User Group - now called the ADVISA User Group - is scheduled. If you haven't attended in the past, please make every effort to do so. This session is the most unique and interesting activity of the year! Please make every attempt to be there!!

Why Attend?

Client Presentations on how they maximize PI within their organizations!
New Products & Services to help your company become more productive and profitable!
Experiential exercises to help demonstrate the concepts of PI to your people!
Advanced Learning Concepts!
Learning, Fun, Networking and More!!!

Date: Wednesday, November 11, 2009

Time: 9 am – 3 pm

Location: Day's Inn Lansing
(Formerly: Best Western Midway Hotel Lansing)
7711 West Saginaw Highway
Lansing, MI 48917

Fee: \$25 per person - Fee includes refreshments for the day and a delicious lunch! Contact Jay Hawreluk to sign up at jhawreluk@advisausa.com.

Happy Anniversary

ADVISA is honored to have clients that use our services year in and year out. The following clients have or will celebrate milestone anniversaries during the fourth quarter of 2009:

20
YEARS

Major Tool & Machine, November
Corsi Cabinet, November

15
YEARS

Bill Marsh Auto, October
National Nail, December

5
YEARS

Pacific Hospitality Group, October
Schmidt Associates, November
OPW, November

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C. If you can't find anyone with the qualifications you're looking for with profiles that fit those parameters, hire high B low C people.

D. Avoid hiring people with low A, low B, high C and D higher than A profiles.

But, that's still not the end of the process.

Step 6. Come back after 6 – 12 months and evaluate what is and what isn't working in your hiring based on the results and analyze again.

Anyone who uses PI in the hiring process knows it works. It measures what it's supposed to measure and has the capability to dramatically impact both turnover and productivity. But, don't stop your evaluation of what the best profile is for your job after only one iteration of the process.

Pull out the profiles of the people you've hired over that period of time and compare their actual performance (including those who were terminated) in respect to their profiles. You might find that the direction you've taken is exactly right; that turnover has been cut by 50% while productivity has increased commensurately. You may also find that there are still profile discrepancies between your best and your worst and that you have the opportunity to refine who makes the best profile for a hire commensurately. Follow this same step again in another year to 18 months and continue checking over time to make sure there isn't anything new to learn from the process.

When you follow these steps to determine the best profile for a job and hire accordingly, you will be rewarded with less turnover and a more productive staff.