



PI[®] Fridays with Bob

January 28th, 2011

Profiling a Job

Bob Wilson, Facilitator

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Profiling a Job



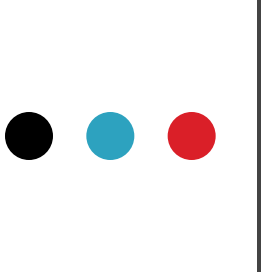
Creating KPRs

- Create a team of people who know the job
- Categorize job tasks into areas of responsibility (KPA)
- Develop metrics that delineate acceptable levels of performance for each job task



KPRs should be SMART

- Specific
- Measurable
- Achievable
- Realistic
- Timely



Step 1: Getting a broad sense of PI Profile – the Key Factor Relationships

Generalist vs. Specialist (A/D)

- risk vs. risk aversion
- results vs. execution

Methodical vs. Urgent (C)

- process vs. multi-task
- stable vs. pressure

Thing vs. People (A/B)

- planning vs. motivating
- organization vs. enthusiasm



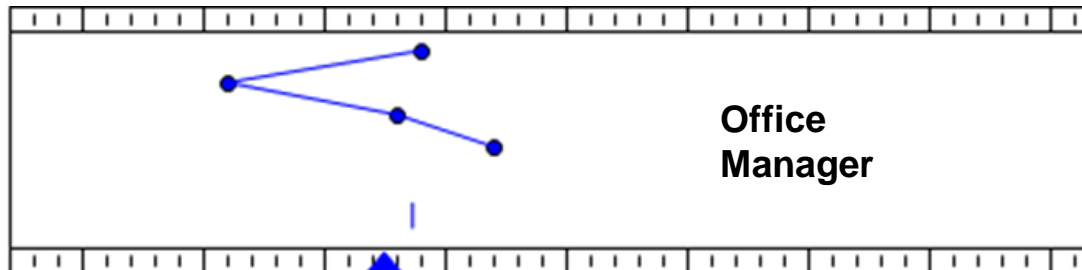
Compared to the KPRs

- Accurately perform payroll responsibilities including payroll, projections, KPR reports, monthly and quarterly tax filings, etc. so each is complete by the end of the day of payroll.

(Specialist,?, Thing)

- Serve as Technical Operations coordinator – purchasing, administering, maintaining and running the hardware, software, office and computer equipment. Establishing fixes for computer problems either individually or through vendors wherever possible within one business day – ideally, sooner.

(Specialist, Low C, Thing)



A decorative graphic consisting of three colored circles (black, cyan, and red) arranged horizontally to the left of a vertical black line that extends upwards and downwards.

Step 2: The PRO Form

- Gather the same team that executed the KPRs
- Talk through each of the questions
- Frequent *and*
- Important



PRO Advantage

- It creates the ideal profile for a job

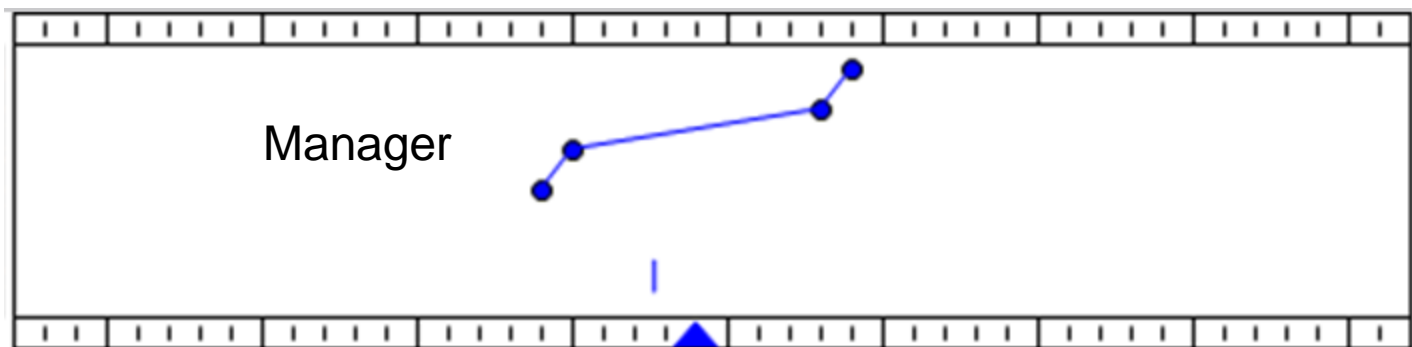


PRO Disadvantages

- Doesn't match the "real" culture of the job
- Leaves the impression of one perfect profile – unnecessarily trimming the pool
- Doesn't measure the culture of a team
- Doesn't measure promotability



The PRO doesn't convey the culture

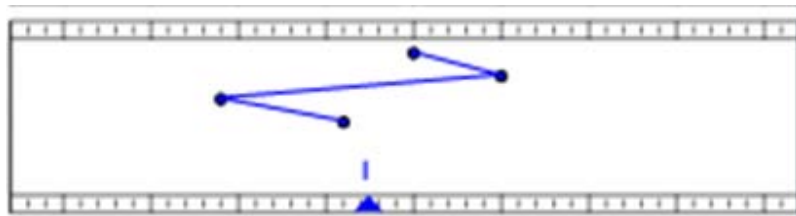




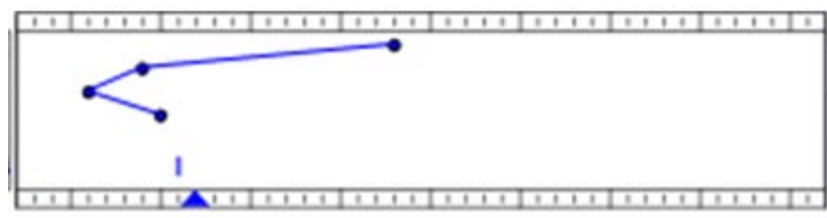
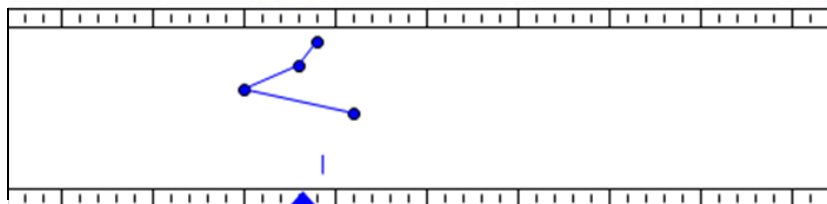
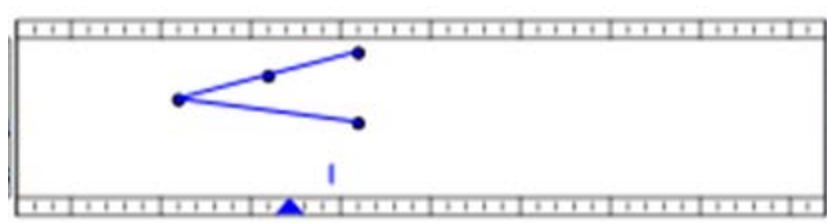
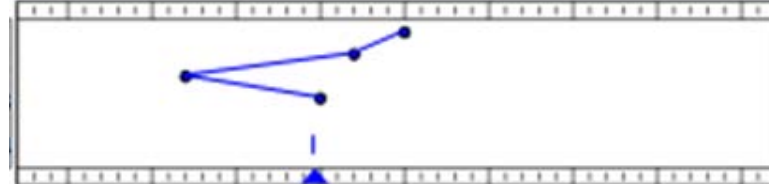
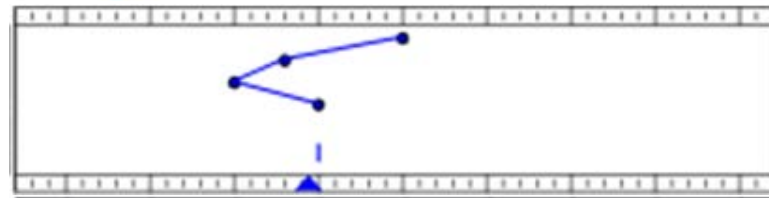
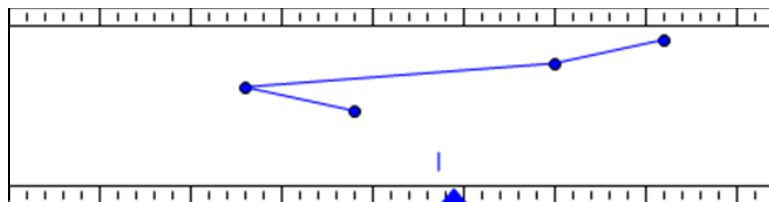
The PRO alone vs. looking at profiles



Outside Sales – School Promotions PRO

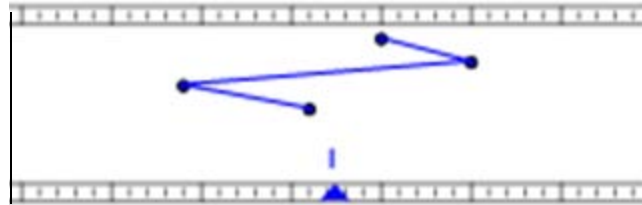


Other successful profiles:

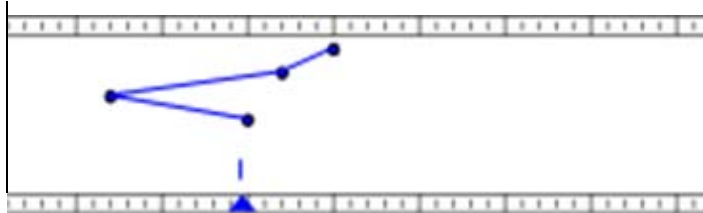
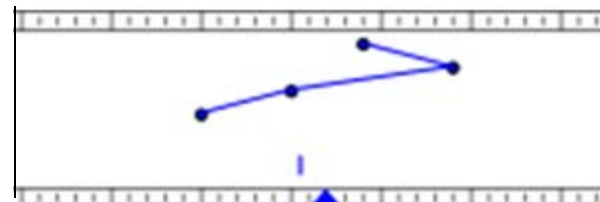
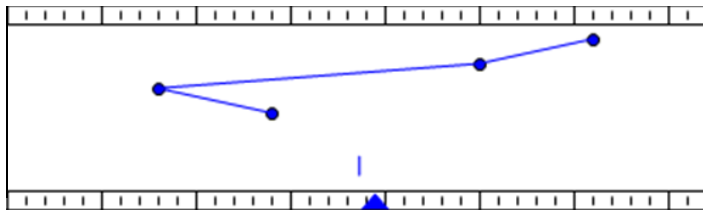




Outside Sales – Business Development



Other successful profiles:





Determining the Best Profile Based on Experience

- Evaluate performance – Excellent, Good, Fair, Poor
- Compare profiles of best and worst
- Use the most recent cut-off date in the excellent category as the minimum
- Evaluate trends in factors, factor combinations, M and E scores – focusing first on self



Sales Group Evaluation

High B, low C

- 66% of the top group;
- 25% of the bottom group

High A, lower D

- 66% of the top group;
- 25% of the bottom group

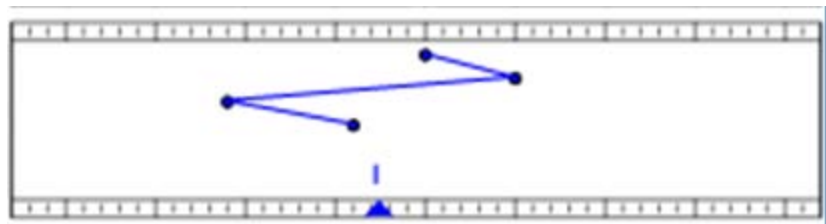
High D, low B

- 63% of the bottom group;
- 23% of the top group

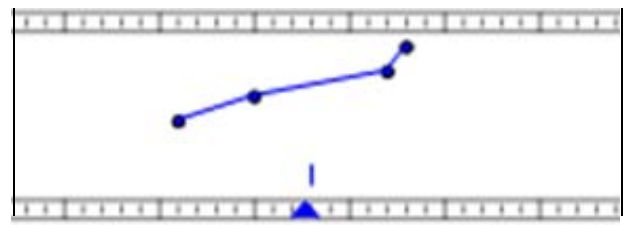
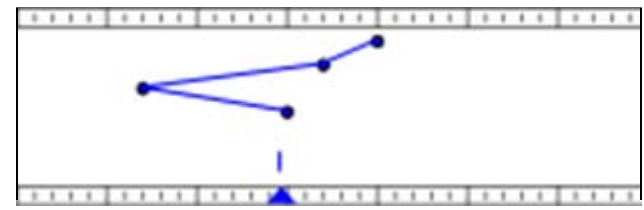
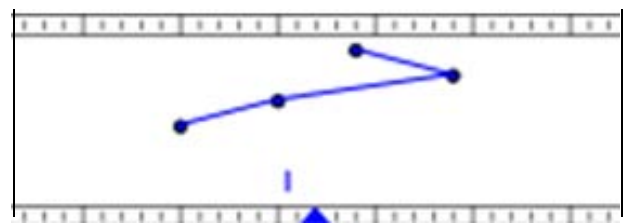
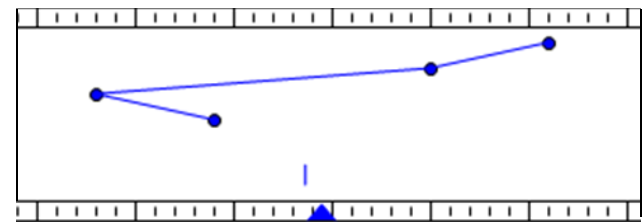


Range of Acceptable Profiles

PRO – Persuasive



Others that worked just as well





Commit to Continuous Improvement

- re-evaluate in 6-12 months
- refine
- repeat



Expect Results

- Less turnover
- More productive staff



Questions for Bob





Next Session

February 25th

9 a.m. ET

Topic: C Drive

*In the meantime, visit our blog at:
<http://blog.advisausa.com/blog/advisa>*

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