# Field Assessments - Ideal Client Profile

**What is my product (for the Category)?**

Field Assessments offer a variety of tools for hiring managers and recruiters to administer to prospective candidates to make informed hiring decisions. Assessments can be used for initial screening, or to provide in-depth information about candidates.

Field Assessments can be used for a variety of hiring needs, including:

* Screening a large number of candidates (job fair, major recruiting efforts)
* Determining a candidate’s probability of survival and production during their first year in role
* Gathering insight into a candidate’s personality, selling style, motivations, concerns, expectations, and preferences
* Determining a candidate or current employee’s preference to collaborative work or solo practice
* Examine candidate’s preferred way of learning to increase efficacy of training initiatives
* Determine candidate’s probability of passing licensing exams on the first attempt
* Establish candidate’s service orientation
* Help the candidate or incumbent increase sales efficacy

**Product Offerings:**

* **RightChoice –** a modular assessment system with various components, catered to meet the needs of member companies
  + **SuccessPredictor** – uses biographical data to identify candidate’s potential for success. Success is defined as probability of first year survival and being in the top 50% of producers within the first year of employment
  + **SalesPersona** – determines candidates’ sales personality makeup and motivators, and identifies approach/style candidate is most likely to use in a variety of work scenarios
  + **CareerView –** determines candidate’s work style preferences, motivators, concerns, and expectations so hiring managers can better provide a realistic preview of the career and evaluate candidates’ appropriate fit
  + **CollaboRate –** determines candidate’s preference for collaborative work
  + **Performance Skills Index –** cognitive skills assessment used to identify candidate/employee’s probability of success for passing licensing exams on their first try
  + **LeaderPersona –** determines candidate/employee’s likely effectiveness in traditional leadership functions, such as recruiting, selection, training, coaching, and managing producers and staff
  + **Learning Styles -**  assesses candidate’s primary learning style for organizational understanding and leverage
* **Other Assessments –** assessments that are independent of the RightChoice model
  + **Personality Styles Profile (PSP)** **–** measures an individual’s communication style during the sales process (called “selling style”)
  + **Career Profile + (CP)-** uses biographical data to determine candidate’s probability of success in the industry. *Career Profile is the precursor product to SuccessPredictor and other RightChoice components.* CP has variations that include personality and a version specifically for MLEA lines of business
  + **Field Leadership Profile (FLP) –** identifies competencies known to underlie field leadership performance
  + **ServiceFirst –** self-report measure to determine candidate’s service orientation
  + **SalesBooster -**  development tool to help incumbents receive training to increase sales efficacy – while offered as a stand-alone product, its main usage is as a component of TrustworthySelling
  + **Career Choice –** international version of Career Profile – includes biodata as well as a personality component
  + **Recruit2Go –** short assessment used predominantly in a job fair/recruiting environment – determine prospective candidate’s fit for a position within financial services

**Whom is my product right for?**

Field assessments are predominantly for recruiters and hiring managers who are looking to assess candidates prior to hiring. Predictive assessments (CP+, SuccessPredictor, PSI) are best positioned for the screening phase of hiring, while others are used during selection and provide more information about a candidate’s fit to the role. Specific assessments (FLP, LeaderPersona) are best used to determine aptitude for leadership. LearningStyles, CollaboRate, SalesPersona, and CareerView can be added to an introductory assessment or later in the process, and can encourage development and training.

Internationally (defined as outside of the US and Canada), CareerChoice should be recommended for candidate screening.

**Categories and Target Markets (Opportunities):**

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| --- | --- | --- | --- |
| Product(s) | Key Decision Makers | Position(s) | What are their issues/concerns? |
| SuccessPredictor | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors  Commission financial sales associates who do their own prospecting and-sell at least some life insurance  Inexperienced Advisors | * Hiring qualified candidates * New hire turnover due to lack of survival (leaving within their first year) * New hires underperforming from a production standpoint * Want to determine likelihood of candidate being a success in the industry (can the candidate do the job?) |
| SalesPersona | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors  Commission financial sales associates  Inexperienced Advisors | * Hiring candidates with the right personality makeup and motivators to be successful * Want to determine if candidate’s motivators and personality are conducive to a successful career (will the candidate do the job?) |
| CareerView | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors  Commission financial sales associates  Inexperienced Advisors | * What are my candidate’s work style preferences, motivators, expectations in the role, and concerns with the role? * How well will my candidate fit within this organization? |
| CollaboRate | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors  Commission financial sales associates  Inexperienced advisors | * How well will this candidate perform in a team/collaborative environment? * Does this candidate perform better individually or in a group environment? |
| Performance Skills Index (PSI) | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors who require licensing  Existing Advisors who require licensing  Commission financial sales associates who require licensing  Inexperienced advisors that require licensing | * Want to determine likelihood of candidate/new associate passing licensure exams * Want to ensure investment in new candidate is rewarded with licensed candidates in as few attempts as possible |
| LeaderPersona | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Commission financial sales associates  Field sales or leader roles that include functions such as recruiting, selecting, etc.  Inexperienced advisors | * Looking to promote internal sales agents to higher-level roles, but want to make sure candidate will be effective in higher-level role * Can our sales associates effectively recruit, select, train, coach, and manage producers and support staff if promoted into leadership? |
| LearningStyles | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selecting  Contact Center Reps  Existing Advisors | * How effective will our onboarding/training be? * What is the best way to implement training to our organization? |
| Personality Styles Profile (PSP) | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selecting | * What is this candidate’s selling style? * Want to determine how candidate will communicate during the sales process? * How can I best select, recruit, and develop candidates with a specific style? |
| Field Leadership Profile (FLP) | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selecting  Existing Advisors | * Looking to promote internal sales agents to higher-level roles, but want to make sure candidate will be effective in higher-level role * Can our sales associates effectively recruit, select, train, coach, and manage producers and support staff |
| Service First | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selecting | * Is this candidate service-oriented? * Looking for candidates who have a high customer-first perspective |
| SalesBooster | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Existing Advisors | * Low sales numbers * Not meeting budget * *Companies looking for these needs may be better served by referral to our Trustworthy Selling program* |
| Career Choice | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selecting | *International product*   * Hiring qualified candidates * New hire turnover due to lack of survival (leaving within their first year) * New hires underperforming from a production standpoint * Want to determine likelihood of candidate being a success in the industry (can the candidate do the job?) |
| Recruit2Go | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | Recruiting & Selection | * Looking for quick, mobile-based screening tool to screen a wide number of candidates (job fair, career fair, walk-in applicants, etc.) |
| Career Profile (CP) | Heads of Recruiting Selection and Distribution Management  Others responsible for recruiting and selecting the next generation of field talent | New Advisors  Commission financial sales associates who do their own prospecting and-sell at least some life insurance  Inexperienced Advisors | * See notes on CP – recommendations and needs match SuccessPredictor |