

## SUPPLEMENTAL GUIDE

The LeaderPersona assessment indicates how well the candidate is likely to perform tasks related to **financial sales management** positions, such as:

- Selecting and hiring agents and staff
- Training and coaching new personnel
- Managing staff performance and providing support
- Managing the business in an efficient and effective manner

This assessment is based on the candidate's standing on the following set of leadership competencies.

### BELIEF IN SELF

Expresses confidence in ability to succeed and reach goals

#### LOW 1 – 3

Candidates with a **low Belief in Self** score:

- Lack confidence in their ability to get things done
- Do not challenge themselves by setting difficult goals
- Lose motivation if a task becomes too difficult

#### MODERATE 4 – 7

Candidates with a **moderate Belief in Self** score:

- Have some confidence in their ability to get things done
- Set moderately challenging goals
- May maintain motivation to complete a task, until it becomes too difficult

#### HIGH 8 – 10

Candidates with a **high Belief in Self** score:

- Have a high level of confidence in their ability to get things done
- Usually set challenging personal goals
- May do whatever it takes to complete a task, once they have set their mind to it

## INTERPERSONAL ORIENTATION

Enjoys interacting with others; has strong “people skills”

### LOW

1 – 3

Candidates with a **low Interpersonal Orientation** score:

- Would rather work alone than work with other people
- May rarely provide support and assistance to co-workers
- Have dealings with others that can be negative and difficult

### MODERATE

4 – 7

Candidates with a **moderate Interpersonal Orientation** score:

- Enjoy working with other people, as long as they are not too difficult
- May sometimes provide support and assistance to co-workers
- Have dealings with others that vary in quality, depending on the individual and the situation

### HIGH

8 – 10

Candidates with a **high Interpersonal Orientation** score:

- Enjoy working with a wide variety of people
- Are eager to provide support and assistance to co-workers
- Have dealings with others that are positive and rewarding

## LEADERSHIP ABILITY

Steps up and takes charge; motivates others to act; is looked to for direction

### LOW

1 – 3

Candidates with a **low Leadership Ability** score:

- Avoid situations where they would be called onto provide direction and guidance
- Lack confidence in their supervisory skills
- Are more comfortable in a supporting role than a leading role

### MODERATE

4 – 7

Candidates with a **moderate Leadership Ability** score:

- May take on a leadership role, when no one else seems willing to
- Evaluate their own supervisory skills as acceptable
- May prefer a supporting role or a leading role, depending on the situation

### HIGH

8 – 10

Candidates with a **high Leadership Ability** score:

- Seek out opportunities to provide leadership and direction
- Believe strongly in their supervisory skills
- Much prefer a leading role to a supporting role

## INNOVATIVE

Skilled at addressing problems in unique and creative ways

### LOW 1 – 3

Candidates with a **low Innovative** score:

- Are most comfortable with “tried and true” approaches
- Do not enjoy the process of brainstorming solutions to a problem
- View potential changes as threatening — something to be avoided

### MODERATE 4 – 7

Candidates with a **moderate Innovative** score:

- Are sometimes willing to try a different approach to their work
- Have limited patience for the process of brainstorming solutions to a problem
- Sometimes view potential changes as positive and sometimes as negative

**HIGH  
8 – 10**  
Candidates with a **high Innovative** score:

- Are interested in finding new and better ways to do their work
- Greatly enjoy the process of brainstorming solutions to a problem
- View potential changes as opportunities to be explored

## FOCUSED

Able to work effectively in an environment with distractions and interruptions

### LOW 1 – 3

Candidates with a **low Focused** score:

- Prefer to work in a quiet, ordered environment
- Do not enjoy multi-tasking
- Are bothered by interruptions when they are in the middle of something

### MODERATE 4 – 7

Candidates with a **moderate Focused** score:

- Sometimes lose their concentration when there is a lot of noise and confusion around them
- Enjoy working on one or two things at the same time, but no more than that
- Can be momentarily distracted by interruptions when they are in the middle of something

**HIGH  
8 – 10**  
Candidates with a **high Focused** score:

- Have no problem working in a noisy, active setting
- Enjoy the variety of working on several things at the same time
- Manage their work load effectively despite interruptions

## AMIABLE

Possesses a friendly and sociable demeanor that encourages trust from others

### LOW 1 – 3

Candidates with a **low Amiable** score:

- May be seen as cool and reserved by their peers
- May rarely find that co-workers confide in them
- Appear uncomfortable in social situations

### MODERATE 4 – 7

Candidates with a **moderate Amiable** score:

- Are seen as moderately friendly by their peers
- May sometimes find that co-workers confide in them
- Are perceived to be somewhat skilled in social situations

### HIGH 8 – 10

Candidates with a **high Amiable** score:

- Are seen as warm and pleasant by their peers
- Are often sought out by co-workers as trusted confidants
- Appear to enjoy social situations and put others at ease

## FLEXIBLE

Open to others' ideas; patient and accommodating

### LOW 1 – 3

Candidates with a **low Flexible** score:

- May tend to push their opinions on others in a group situation
- Are known to lose their temper with co-workers
- May resist changing their plans in order to accommodate others

### MODERATE 4 – 7

Candidates with a **moderate Flexible** score:

- May make an attempt to reach agreement with others in a group situation
- May sometimes be provoked into losing their temper with co-workers
- May sometimes change their plans in order to accommodate others

### HIGH 8 – 10

Candidates with a **high Flexible** score:

- May work to build a consensus in a group, rather than force their opinion on others
- Rarely lose their temper with co-workers
- Are known to change their plans to accommodate others

## ORGANIZED

Operates in a systematic, orderly way; self-disciplined and thorough

### LOW 1 – 3

Candidates with a **low Organized** score:

- Are not detail-oriented
- Have a tendency to let things “fall through the cracks”
- Work in a haphazard and inefficient manner

### MODERATE 4 – 7

Candidates with a **moderate Organized** score:

- Are somewhat detail-oriented
- May sometimes lose track of details
- Usually work in an efficient manner

### HIGH 8 – 10

Candidates with a **high Organized** score:

- Are extremely detail-oriented
- Have a system for keeping track of details
- Work in a methodical and efficient manner