

for Chris Jones

Administrator: tom boglarski

LIMRA Testing (U.S.)
Date: 6/12/2008

The Performance Skills Index (PSI) produces an overall rating that predicts the likelihood that an individual will perform successfully in a contact center job. By performing successfully, we mean the likelihood that this individual will be rated highly (in the top half of all individuals) by his or her manager or supervisor across seven critical skills shown below:

- Learning new information
- Analyzing caller information
- Multi-tasking
- Paying attention to accuracy and detail
- Being flexible and adaptable
- Organizational skills
- Call volume speed

Chris's overall PSI rating is MODERATE. Refer to the Performance Indicators section of this report for more information about Chris's overall performance rating.

Overall PSI Rating
MODERATE

PSI also provides you with information about an individual's preferred learning style. This will help you better understand what type of training and development program is most likely to benefit this individual. Although everyone's behavior varies to a certain extent, most people exhibit one of the following preferred learning styles:

Active	Prefer to learn by doing
Practical	Prefer to apply what they learn to practical, everyday situations
Theoretical	Prefer to take a methodical, logical approach to learning

Based on the answers this individual gave when he or she completed the questionnaire, Chris has an Active learning style.

Preferred Learning Style
ACTIVE

Refer to the Learning Style Guide section of this report for more information about Chris's Active learning style.

Contents of this Report	
Performance Indicators	Page 2
Learning Style Guide	Page 3
Personal Feedback Report	

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Performance Indicators

This section of the report shows this individual's overall Performance Skills Index (PSI) rating. Performance Indicators for PSI can include probability of being a top performer across seven skills (see page 1) in sales and/or service positions as well as the probability of passing specific licensing exams.

Chris received an overall performance rating of 5 (MODERATE)

Overall PSI Rating

Overall PSI Rating: 5 (MODERATE)									
LOW			MODERATE				HIGH		
1	2	3	4	5	6	7	8	9	10
				X					

Call Center Performance Success

- Across PSI users in sales centers, approximately 47 out of 100 candidates who rate 5 are expected to be top performers. This represents MODERATE Potential.
- Across PSI users in service centers, approximately 37 out of 100 candidates who rate 5 are expected to be top performers. This represents MODERATE Potential.

Licensing Success

PSI also predicts the probability that Chris will pass required financial service licensing exams on the first attempt. The probability of passing licensing exam(s) assumes adequate training and preparation by Chris prior to taking the exam(s).

Probability of Passing Licensing Exams										
	LOW			MODERATE				HIGH		
	1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80	81-90	91-100
State Life & Health Licensing							64%			
Series 6				38%						
Series 7					44%					
Series 66						53%				
Property & Casualty Licensing						58%				

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Learning Style Guide

This section of the report identifies this individual's preferred learning style. As a trainer, this information will help you train and develop employees by understanding what types of training and development programs will be most effective for each individual, based on that individual's preferred learning style.

Preferred Learning Style: ACTIVE

Chris has an ACTIVE learning style. This means that Chris likes to be completely involved in the learning experience. This individual prefers action to reflection. He or she is not likely to spend a lot of time planning his or her activities in advance. An individual with an Active learning style enjoys a challenge but tends to rely on his or her own judgment rather than on expert advice. This type of individual can be open-minded and enthusiastic to new ideas. However, he or she can also get easily distracted and bored if the situation drags on too long. Short-term projects that demand quick attention are especially appealing to an individual with an Active learning style.

An individual with an Active learning style is likely to:

- Enjoy a "hands on" learning experience
- Get right to work on the problem at hand and act quickly to solve it
- Welcome challenges that require action
- Be willing to take risks
- Be open-minded and enthusiastic about learning new ideas
- Prefer a fast-paced learning environment

An individual with an Active learning style may be challenged by:

- 🚩 A tendency to become easily distracted or bored during slow periods
- 🚩 Having difficulty with learning situations that emphasize in-depth learning and details
- 🚩 Making decisions that are quick but not necessarily well thought-out or correct
- 🚩 A preference to keep things moving along briskly by constantly switching to different topics

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Training and Developing an Individual with an Active Learning Style

To help this individual get the most out of training and development programs, you may find it helpful to consider the following preferences.

An individual with an Active learning style prefers a training and development program that:

- Consists of new material, experiences, or situations
- Actively involves him or her in the learning process
- Minimizes long lectures and dull reading assignments
- Is fast-paced and does not dwell on one topic for too long

An individual with an Active learning style may be uncomfortable if his or her trainer:

- Forces him or her to learn "expert" solutions rather than encouraging him or her to learn by self-discovery
- Lectures too much or assigns too many long reading assignments
- Does not directly involve and engage him or her in the learning experience

Recommended training activities for an individual with an Active learning style:

- Simulations
- Role-playing exercises
- On-the-job shadowing
- Peer feedback will most likely be better received than trainer feedback

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Interview Questions

Chris has an Active learning style. A well-conducted interview can provide additional insight into Chris's preferred learning style. Listed below are some suggested interview questions based on potential areas of concern for people with an Active learning style.

Following through on assignments and projects

People with an Active learning style sometimes act quickly on things and tend not to follow through on their actions. They may prefer to start up a new activity rather than follow an existing activity through to its conclusion.

Ask: Tell me about a recent project or work assignment that required a lot of follow-up. What was the nature of the project? What kind of follow-up was required? How did you manage all of the activities for the project? What was your least favorite part of the project? Why was that your least favorite part?

Do you like to move quickly from activity to activity, or do you prefer to stick with one activity until it is finished? Do you see any drawbacks to that approach?

Listen for: Interest in follow-up activities; thoroughness; moving too quickly from one project to another

Interview rating for following through on projects:

Not strong on follow through

1

Satisfactory effort on follow through

2

3

Outstanding effort on follow through

4

5

Learning by listening to lectures and experts

People with an Active learning style like to learn by "doing" and teach themselves. They usually prefer to take a self-study program rather than being taught by listening to lectures or expert trainers.

Ask: Tell me about the last time you needed to learn to do something new or you needed to learn new information. What did you have to do to learn it? How did you go about it? What was the toughest part? Could you have learned the things you needed to know in some other way? If so, why did you choose the method you used?

Would you rather be taught through a self-study program or by listening to lectures given by experts? Explain your preference and why it is important to you.

Listen for: Preference in method of learning; flexibility in trying different learning formats

Interview rating for learning by listening to lectures and experts:

Does not learn well

1

Learns satisfactorily

2

3

Learns extremely well

4

5

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Training preferences

People with an Active learning style have strengths and potential areas of concern about learning different types of information. Take this opportunity to find what type of training works best and what type of training is least effective with this individual.

Ask: Tell me about some training experiences you have had in the past. What did you like most about them?

Do you prefer training sessions that are informal and action-oriented or training sessions that are formal and theory-oriented? Why?

How would you design a training program to best meet your learning needs in terms of structure, content, and format?

Listen for: Success with different training exercises and formats; ability to learn information that is presented in different ways

Personal Feedback Report

The next page of this report may be given directly to Chris.

Personal Feedback Report

for Chris Jones

Date Completed: 6/12/2008

The Performance Skills Index (PSI) questionnaire that you completed gathers information about what approach or learning style you are most likely to use in a training class or professional development situation. Understanding your learning style will help you get the most out of learning environments such as employment training and classroom situations. In general, there are three basic learning styles: Active, Practical, and Theoretical.

Individuals with an ACTIVE learning style will generally . . .	prefer to learn by doing rather than by listening or reading. These individuals tend to quickly learn new material. They are likely to rely on their own judgment rather than on expert advice.
Individuals with a PRACTICAL learning style will generally . . .	be highly motivated and self-directed. The primary motivation for these individuals is to figure out how to apply what they learn to practical, on-the-job situations.
Individuals with a THEORETICAL learning style will generally . . .	prefer to carefully think things through before acting. These individuals like to gather lots of information and then take the time to sort through it carefully. They take a methodical, logical approach to learning new material.

Based on your answers when you completed PSI, your preferred learning style is:

Active	Practical	Theoretical
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Individuals with Active learning styles tend to:

- Like "hands on" learning experiences
- Act quickly to resolve problems and challenges
- Prefer fast-paced learning environments
- Enjoy challenges
- Be willing to take risks
- Be open-minded and enthusiastic about learning new material

Individuals with Active learning styles should try to:

- Stay focused on the subject at hand, especially when the learning environment is slower-paced than they might prefer
- Follow through on the current project or topic before moving on to something new