

Financial Professional – One Sitting

Assessment Fact Sheet

Overview

The Financial Professional solution is for mid-level financial institution positions that require Series 6/7 certification. Sample tasks for this job would include, but are not limited to: recommending investments, acquiring, retaining and expanding new and existing customer relationships, proactively contacting & meeting customers, and discovering customer needs.

Job Level	Professional
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Job Family/Title	Banking
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Details

Number of Sitzings	One
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Designed for Unproctored Environment	Yes
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Question Format	Multiple choice
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Knowledge, Skills, Abilities and Competencies Measured

Professional Potential: This is a measure of the tendency to have potential for professional success across industry type and functional area. This is characterized by scores that are derived from responses to questions regarding academic and social background, and aspirations concerning work.

Learning Potential: This is a measure of the potential for success in jobs across industry type and functional area. Candidates' responses to questions regarding developmental influences, educational and work history, and related values and attitudes are compared with response profiles from successful employees. These items are significantly related to a traditional cognitive test of learning ability.

Achievement Orientation: This measures the potential for success in entry-level jobs. This scale measures self-esteem and developmental indicators of success in entry-level customer service jobs through questions regarding developmental influences, self-esteem, work history, and work-related values and attitudes.

Persistence and Planfulness: This is a measure of the tendency to set specific goals and work hard to achieve these goals. This trait is characterized by: suggesting the best solution for customer needs; being able to direct conversations towards a commitment/order/sale; and continuing to try if not successful the first time.

Customer Focus: This measures the tendency to show persistent enthusiasm when interacting with customers. This trait is characterized by: apologizing sincerely for inconveniences, being patient, tolerating rude customers calmly, and searching for information or products for customers.

Example Reports

Recruiter Report : Financial Professional - Short Form



Applicant Information

Name:
Application Date: Tue Mar 24 13:48:00 EDT 2009
Applicant ID: 3360
Session ID: 11300599830387

This report is confidential and its contents are intended to assist in the prediction of an applicant's work behavior. If you would like more information about this interpretive report or other products that PreVisor offers, please contact your account representative.

Overall Score

Recommended ✓

Percentile	Low	Medium	High
	30	70	100
Overall Score	90		

Detailed Results

Percentile	Low	Medium	High
	30	70	100
Professional Potential	74		
Learning Potential	89		
Achievement Orientation	79		
Persistence and Planfulness	76		
Customer Focus	71		

Score Interpretation

Professional Potential

This is a measure of the tendency to have potential for professional success across industry type and functional area. This is characterized by scores that are derived from responses to questions regarding academic and social background, and aspirations concerning work.

The candidate's response profile concerning past achievements, social orientation, and work orientation is highly similar to the profiles of highly effective professionals. The good match between the profiles suggests that the candidate is likely to be successful in a professional position.