

# 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
	Job Family/Title	Banking
Details	Number of Sittings	One
	Designed for Unproctored Environment	Yes
	Question Format	Multiple choice

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**

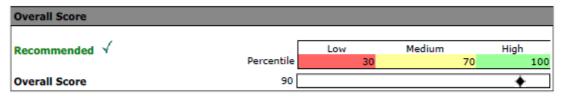
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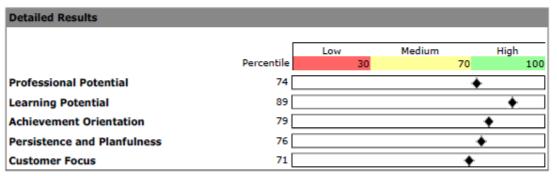
Application Date: Tue Mar 24 13:48:00 EDT 2009

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.





### **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.