

# Financial Service Representative – One Sitting

## **Assessment Fact Sheet**

Overview	The Financial Service Representative solution is for senior-level professional positions in the insurance industry that sell life insurance to businesses and individuals on behalf of insurance companies. Sample tasks for this position include, but are not limited to: calling on policyholders to deliver and explain policies or suggest additions or changes; calculating premiums; customizing insurance programs to suit individual customers; seeking out new clients and developing clientele by networking; ensuring policy requirements are fulfilled; and conferring with clients to obtain and provide information when claims are made on a policy. Potential job titles that use this solution are: Life Insurance Sales Professional; Insurance Sales Agent.	
	Job Level	Professional
	Job Family/Title	Insurance
Details	Average Testing Time (minutes)	44 minutes
	Maximum Number of Questions	203 items
	Number of Sittings	One
	Designed for Unproctored Environment	Yes
	Question Format	Multiple choice

# Knowledge, Skills, Abilities and Competencies Measured

#### Screening (Unproctored)

**Sales Potential**: This is a measure of the tendency to have a combination of sales skills and experiences that predict success in sales positions. This is characterized by: showing alternative solutions based on customer needs; directing conversations toward a commitment/order/sale; showing confidence even after a hard refusal/rejection; and striving to close a transaction every time. This is demonstrated by answering questions on a multifaceted measure relating to background, experience, and opinions.

**Professional Potential**: This component measures the tendency to have potential for success in the retail industry. This is characterized by scores that are derived from responses to questions regarding academic and social background, and aspirations concerning work.

**Drive for Results**: This is a measure of the tendency to take a leadership role within an organization. This trait is characterized by: taking pride in reaching difficult goals; enjoying a fast-paced lifestyle; having high self-confidence in his/her abilities; and taking charge in group situations.

**Self-Motivation**: This is a measure of the tendency to be even-tempered and responsible in the workplace. This trait is characterized by: being dependable; behaving in accordance with high ethical standards; being optimistic; and remaining relaxed in stressful situations.

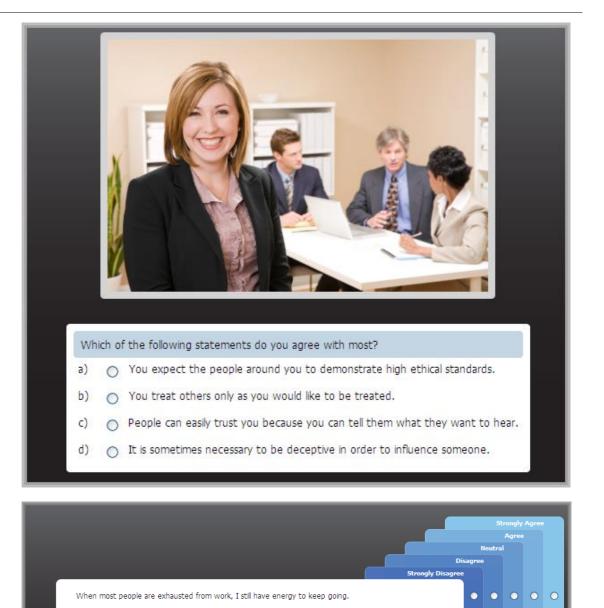
**Business Acumen**: This is a measure of the tendency to analyze and detect underlying themes when solving problems. This is a trait characterized by: visualizing future needs and problems; being creative



and innovative when generating new ideas; systematically looking at data; and planning and organizing tasks.

**Senior Sales Retention**: This is a measure of background, experiences, attitudes and opinions that are associated with voluntary job tenure in senior-level sales positions. It is designed to assess a variety of factors that affect retention that are independent of job performance, and it is NOT included in the overall solution score. Rather, it is provided as an additional piece of information that may be considered along with the other scores that predict actual job performance.

### Example Questions



I like taking charge.



The on-the-job help I've gotten from supervisors I've had has been: a) outstanding b) very good c) good d) fair e) poor f) onone of my supervisors has really helped me

# Example Reports

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