

Insurance Account Manager – One Sitting

Assessment Fact Sheet

Overview

The Insurance Account Manager solution is for mid-level insurance professionals that manage the day-to-day operations and activities of customer accounts. Sample tasks for this job include, but are not limited to: soliciting sales of new or additional products or services; interacting with customers to provide information in response to inquiries about products and services and to handle and resolve complaints; keeping records of customer interactions and transactions; resolving customers' service or billing complaints; determining charges for services requested; collecting deposits or payments; and arranging for billing. Potential job titles that use this solution are: Account Executive, Account Manager, and Senior Account Manager.

Job Level	Mid-Professional
Job Family/Title	Insurance

Details

Average Testing Time (minutes)	48 minutes
Maximum Number of Questions	265 questions (235 questions on average)
Number of Sitzings	One
Designed for Unproctored Environment	Yes
Question Format	Multiple Choice, Multiple Choice - Adaptive

Knowledge, Skills, Abilities and Competencies Measured

Persistence: This measures the tendency to be influential, confident, and persistent when working towards sales goals. This trait is characterized by suggesting solutions to meet customer needs, demonstrating confidence in the sales process, and persisting and displaying resiliency when faced with challenges or setbacks.

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.

Example Questions



Which of the following statements do you agree with most?

- a) ☐ You expect the people around you to demonstrate high ethical standards.
- b) ☐ You treat others only as you would like to be treated.
- c) ☐ People can easily trust you because you can tell them what they want to hear.
- d) ☐ It is sometimes necessary to be deceptive in order to influence someone.

How many sales courses or sales training programs have you attended?

- a) ☐ none
- b) ☐ one or two
- c) ☐ three or four
- d) ☐ five or more

Example Report

Detailed Report: Insurance 5.5: Insurance Account Manager – Short Form
Recruiter Interview Development
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Applicant Information
Name:
Application Date: Wed Oct 28 14:31:00 EDT 2009
Applicant ID: 12412240
Session ID: 550081421595884070
Library: Selection
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 ✓
Overall Score 87

Low	Medium	High
Percentile 30	70	100

Detailed Results

	Low	Medium	High
Percentile	30	70	100

Persistence	85		
Sales Potential	78		
Professional Potential	100		
Drive For Results	56		
Business Acumen	63		

Score Interpretation
Persistence
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.
The candidate is more likely than other candidates to prefer challenging tasks. The candidate will usually work quickly and get more done than others. He/she tends to be a self-starter, continually set new, higher goals, and be rated above average on 'sales-skills.'
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.
The candidate is more likely to have a history of sales-related positions and accomplishments. The candidate is more likely to be able to qualify a sales opportunity and complete the sale. The candidate is more likely to be highly motivated and will tend to establish and attain demanding goals that stretch their individual capability.
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.
This 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 this candidate is likely to be successful in a professional position.
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.
The candidate is likely to be somewhat motivated to succeed. The candidate tends to set moderately difficult goals for him/herself and others. The candidate is likely to occasionally be proactive in taking action.
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.
The candidate is likely to be able to control emotions in the workplace most of the time. The candidate will generally have a positive attitude and be somewhat optimistic about the future. The candidate takes responsibility for his/her actions most of the time and demonstrates moderate levels of professionalism.
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.
The candidate is likely to have average planning and organizing skills. He/she may be somewhat innovative and use alternative modes of thinking some of the time. The candidate is likely to learn at an average pace.

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