

Insurance Agent – One Sitting

Assessment Fact Sheet

Overview

The Insurance Agent solution is for mid-level professional positions in the insurance industry that sell property, casualty, automotive, or other types of insurance. 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; 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: Insurance Sales Professional; Insurance Sales Agent; Producer; Insurance Agent.

Job Level	Mid-Professional
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Job Family/Title	Insurance
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Details

Average Testing Time (minutes)	46 minutes
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Maximum Number of Questions	123 questions (118 on average)
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Number of Sitzings	One
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Designed for Unproctored Environment	Yes
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Question Format	Multiple Choice, Multiple Choice – Adaptive
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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.

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.

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.

Example Questions

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

Which of the following have you disliked most about any job situation you have been in?

- a) ☐ poor pay
- b) ☐ lack of cooperation among employees
- c) ☐ lack of recognition
- d) ☐ resistance to new ideas
- e) ☐ lack of support and direction
- f) ☐ lack of interesting work

You get confused when faced with a new problem.

Your friends have mostly the same likes and dislikes as you.

True

False

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) ☐ none of my supervisors has really helped me

Example Report

Detailed Report: Insurance 5.5: Insurance Agent – Short Form
Recruiter Interview Development
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Applicant Information
Name:
Application Date: Wed Oct 28 11:58:00 EDT 2009
Applicant ID: 12411152
Session ID: 886141421403274571
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 85

	Low	Medium	High
Percentile	30	70	100

Detailed Results

	Low	Medium	High
Percentile	30	70	100

Persistence	51		
Sales Potential	77		
Customer Focus	98		
Professional Potential	64		

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 may have a slight tendency to work at a slow, steady pace. The candidate is likely to be satisfied with average job performance and may not always set the most challenging goals. He/she may sometimes fail to persist after a client says 'no.'

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.

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.
The candidate is likely to be competent and courteous by communicating effectively, showing persistent enthusiasm in customer interactions, and giving customers full attention. The candidate is also likely to tolerate rude customers calmly, find solutions for customer problems, and remain cheerful throughout the workday.

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 moderately similar to the profiles of highly effective professionals. The moderate match between the profiles suggests that this candidate is somewhat likely to be successful in a professional position.

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