

Personal Banker – Loan Officer – One Sitting

Assessment Fact Sheet

Overview

The Personal Banker – Loan Officer solution is for entry to mid-level financial institution positions. Sample tasks for this job would include, but are not limited to: acquiring, retaining and expanding new and existing customer relationships, discovering customer needs, making the best recommendation, completing sales, proactively contacting & meeting customers, and asking for referrals.

Job Level	Entry Level
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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

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.

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.

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.

Example Report

Recruiter Report : Personal Banker - Loan Officer - Short Form



Applicant Information

Name:
Application Date: Tue Mar 24 13:59:00 EDT 2009
Applicant ID: 3387
Session ID: 51240600314757

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 ✓

	Low	Medium	High
Percentile	30	70	100
Overall Score	63		

Detailed Results

	Low	Medium	High
Percentile	30	70	100
Learning Potential	100		
Persistence and Planfulness	8		
Sales Potential	14		
Customer Focus	94		

Score Interpretation

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.

The candidate's score indicates that his/her responses regarding education and work-related experiences are very similar to those with high learning ability. The candidate's experiences indicate a propensity to learn work-related tasks, processes, and procedures efficiently and effectively. In addition, the candidate will tend to do well on problems involving numerical reasoning. Thus, the candidate is highly likely to succeed in positions requiring these abilities.