Management Potential ● Assessment

For Banks

Results Report

For:
Sample Bank

Name: Sample, Jane		Date Completed: 09/26/14
Position Applied For:: Supervisor		Location: Main

REALITY ✓™
TECHNOLOGY

HELM
AND ASSOCIATES, INC.

WHAT IS THE MPA?

The **MPA** (Management Potential Assessment) is a tool to provide insight and guidance about a person's potential for supervisory and management positions by assessing the person's relative work-related strengths and concerns that are driven by basic personality-driven factors.

The MPA identifies five important work-relevant areas of behavior that affect a person's overall job performance. These areas are called Behavior Clusters:

- Work Style
- Management Style
- Dealing with People
- Problem Solving
- Mental Toughness

For each Behavior Cluster, the MPA shows, *for this person*, whether the cluster indicates a strength, caution, or concern.

HOW TO USE THE MPA RESULTS REPORT:

1. **Know What the Job Requires.**

   Start with your understanding of the job-relevant requirements of the job for which the person is being considered. What behaviors will meet the demands of the job? For example, is the ability to work as a member of a team to accomplish goals and objectives critical, or is it useful but not required?

2. **What Does This Person Bring to the Job?**

   Read about what each Behavior Cluster measures. Then look at this person's Behavior Cluster results; these results describe whether this person brings overall strength, caution or concern in each cluster. Compare these results to your understanding of what the requirements of the job are. This will help you understand which behaviors are more important or less important *for this person*.

3. **Coach for Better Performance**

   Coaching Suggestions are provided that are customized to this person's strengths, cautions, and concerns. Use the Coaching Suggestions that are relevant as needed to help guide this person's performance and development.
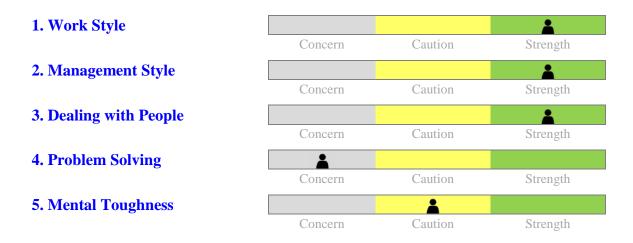
Behavior Clusters
Overview

What STRENGTH, CAUTION, AND CONCERN mean:

"Strength" in a Behavior Cluster suggests that the person is able to balance his or her underlying preferences for the most part effectively.
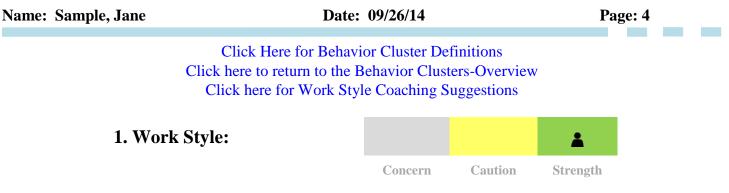
"Caution" in a Behavior Cluster suggests that the person has some underlying preferences that may result in uneven performance on the job if they are not addressed through training and coaching.

"Concern" in a Behavior Cluster suggests that the person has underlying preferences that are strong enough to result in more problematic performance in this area than most people display.

	Concern	Caution	Strength
1. Work Style			●
2. Management Style			●
3. Dealing with People			●
4. Problem Solving	●		
5. Mental Toughness		●	

Note: A behavior cluster is based on several basic personality preferences, some of which may be stronger than others. A preference that suggests concern (gray area) should not automatically be seen as a significant liability. Its potential impact should be evaluated in terms of the requirements of the job.
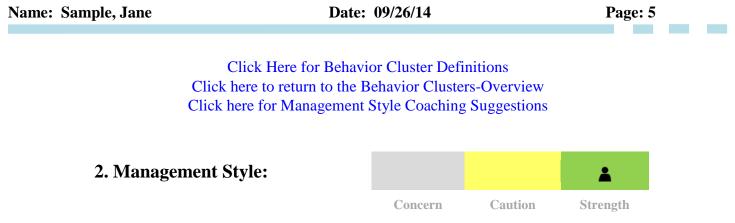
Note: Jane's performance on the job will depend on the interaction of his or her basic work preferences, the requirements of the job, relevant work experiences, life experiences, etc. The degree to which Jane's behavior varies will depend on the specific circumstances at that time.

Click Here for Behavior Cluster Definitions
Click here to return to the Behavior Clusters-Overview
Click here for Work Style Coaching Suggestions

1. Work Style:

Concern	Caution	Strength

Work Style Cluster Result: 'Strength' in the Work Style cluster suggests that this person is able to balance the demands for planning and organization, problem solving, control of impulsive behavior, and work pace and stamina for the most part effectively.

What Jane's Work Style Preferences Mean:

- **Energetic vs. Deliberate**: Good energy level; will be able to work at a good pace; work style will be supported by adequate stamina and reserves of energy.

- **Open vs. Resistant to Others' Ideas**: More open to coaching if she feels that the "coach" is credible; will listen to those people she feels know what they are talking about.

- **Strongly Prefers Change vs. Strongly Prefers the Familiar**: Inflexible; resists change, even small changes; sees "the old way" as the better way; rigid.

- **Big Picture vs. Detail Approach**: Her work style is affected by her preference for first understanding a new situation's or project's final goal; when she has a grasp of this "big picture" she then has a context for how to use what is known, or what resources are required to achieve the overall goal.

- **Restraint vs. Impulsiveness**: Good work style; considerate of others in her actions; strives to be deliberate in thought and speech; restrained shows of excitement or enthusiasm.

- **Quick Thinking vs. Needs Extra Time and Guidance**: Good (average) practical intelligence; will learn new methods, procedures, and processes readily; will work her way through new ideas at an average rate.

Click Here for Behavior Cluster Definitions
Click here to return to the Behavior Clusters-Overview
Click here for Management Style Coaching Suggestions

2. Management Style:

Concern	Caution	Strength

Management Style Cluster Mean: 'Strength' in the Management Style cluster suggests that this person has the potential to lead and direct the activities of others effectively.

What Jane's Management Style Preferences Mean:

- **Initiates Action vs. Waits for Direction**: Good take-charge tendencies; will initiate action or take charge in situations where it has been made clear that it is necessary; has potential to use initiative in situations in which it has not specifically been assigned.

- **Willing to Delegate Tasks vs. Micromanaging**: Prefers to work as an individual contributor, but able to delegate tasks to others once they have "proven" themselves to her; will tend to micromanage others efforts for extended periods.

- **Wing It vs. Plan It**: Average preference for planning and structuring work; understands the need for preparation and organization.

- **Straightforward vs. Timid**: Dislikes directing other people; uncomfortable with confrontations but will force herself to do it if necessary; has difficulty finding the middle ground between being too forceful or too lenient with a problem employee; finds it difficult to end conversations she doesn't want to be a part of.

- **Abstract vs. Concrete Thinker**: Good balance between abstract and concrete thinking; average mental abilities are almost always more than adequate for managing the efforts of others;
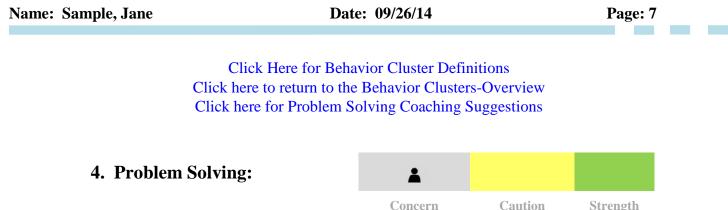
3. Dealing with People:

Concern	**Caution**	**Strength**

Dealing with People Cluster Result: 'Strength' in the Dealing with People cluster suggests that this person has the potential to interact with customers, co-workers, and other people effectively.

What Jane's Dealing with People Preferences Mean:

- **Outgoing vs. Shy**: For the most part out-going; participates willingly in interactions with people but will not always initiate them; average in terms of social skills.

- **Too Sympathetic vs. Too Unsympathetic**: Friendly; makes an effort to get along with people; pleasant to be around; seen by most people as "a nice person."

- **Trusting vs. Cynical**: Generally trusting and balanced in her dealings with others; able to get along in a group and share responsibility; tends to hold back a bit with people she does not know well until they prove themselves to her.

- **Assertive vs. Not Assertive**: Limited courage in her dealings with co-workers; may not always stand up for herself; tends to give in when her opinions are challenged; anxious about the unfamiliar or the uncertain; has difficulty speaking up in meetings.

- **Thick-Skinned vs. Sensitive**: Somewhat thin-skinned; may regard many comments as personal attacks unless it is clear they are offered in a constructive and supportive manner; sensitive to indifference, lack of consideration, or unkindness from co-workers.

- **Spontaneous vs. Cautious**: Deals with people in a careful way; prefers to think things through before speaking; strives to be deliberate in thought and speech.

4. Problem Solving:
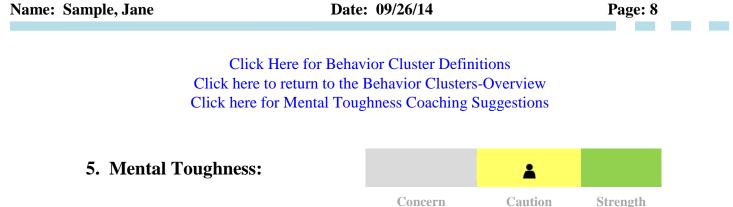
| Concern | Caution | Strength |

Problem Solving Cluster Result: 'Concern' in the Problem Solving cluster suggests that this person has underlying personality-driven preferences that are strong enough to result in more problematic performance in this area than most people display.

What Jane's Problem Solving Preferences Mean:

- **Out of the Box vs. Traditional Problem Solving**: Can be an "out of the box" thinker but prefers to first use tried and true problem solving solutions; average thinking ability; can make connections between different ideas.

- **Careful vs. Rushed**: Evaluates problems carefully before taking action; values care and prudence in problem solving; calm approach to "brushfire" problems; not excitable; able to remain focused on the problem in tense situations.

- **Logical vs. Intuitive**: Strongly prefers to approach problems based on intuition and values; comfortable with possible solutions that "don't make sense" as long as the solutions produce good results; tends not to pay attention to the facts of a situation during the problem-solving process.

- **Open to New Solutions vs. Prefers the Tried and True**: Prefers to just leap in and start trying obvious solutions; will resist changing to new approaches to solving problems if she is already familiar with established solutions; dislikes putting a lot of thought into how to deal with a problem.

- **Big Picture Preference vs. Detail Preference**: Understands a problem better when first given an overview of the problem, its overall implications, and its ideal solution, and then relevant details and specifics.

Click Here for Behavior Cluster Definitions
Click here to return to the Behavior Clusters-Overview
Click here for Mental Toughness Coaching Suggestions

5. Mental Toughness:

Concern	Caution	Strength

Mental Toughness Cluster Result: 'Caution' in the Mental Toughness cluster suggests that this person has some underlying personality-driven preferences that may result in uneven performance on the job if they are not addressed through training and coaching.

What Jane's Mental Toughness Preferences Mean:

⇨ **Focus on Issue vs. Self**: Brittle emotionally; strong personal challenges can produce an emotional reaction in spite of her best efforts.

⇨ **Even-Keeled vs. Worrier**: Something of a worrier; mistakes and set-backs in her work will upset her emotional balance; moods will be influenced by negative events in her professional and personal life; may have difficulty recovering emotionally from feeling low.

● **Calm under Stress vs. Emotional under Stress**: Reacts to crises with calm and focus; deals with what needs to be done; not distracted by clamor or the emotional reactions of others.

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

1. Jane's Work Style:

- **Energetic vs. Deliberate:** She has a strong energy level and should be able to work quickly when that is necessary, and to work at a sustained level over long periods of time. An obviously slower work pace on her part, therefore, may be a sign of some other problem; if you see a sudden change in work pace or stamina, don't assume it will correct itself. Make sure that you help her explore reasons for it and come up with a plan to address any problem.

- **Open vs. Resistant to Others' Ideas:** She is coachable and takes direction and advice well. As she becomes more experienced in the job, she may become so comfortable with what she knows that she is not as open to learning new ways to do things. If she seems to grow impatient with direction and advice, remind her that new information usually brings a new perspective to familiar problems that may open new opportunities.

- **Strongly Prefers Change vs. Strongly Prefers the Familiar:** Her work style will be hampered, at times, by her difficulty adapting to change. Encourage her to anticipate the occasional need for changes in routines, procedures, or priorities by reminding her to ask herself, once each day, what might happen that would require her to do things differently. Encourage her to think about what could go wrong and, if it did, what she would do to deal with new circumstances. Play "what if" games with her to help her think more flexibly about how to deal with new circumstances.

- **Big Picture vs. Detail Approach:** She likes to approach problems and new situations flexibly, focusing on the needs of the current situation while also thinking about the bigger picture – that is, how will her actions affect related situations? She looks for similar problems she has dealt with in the past and applies the implications of her earlier decisions to this one. If she seems to get lost, from time to time, in details, coach her by asking her about the overall objective and ask her to look at her priorities once again.

- **Restraint vs. Impulsiveness**: Her work style will usually be neither too rushed nor too deliberate. She uses restraint effectively. Unusual impulsiveness may be a signal that stress in some area is having an effect on her work. If you see a pattern of impulsive behavior, bring it to her attention and explore ways with her to handle the situation more effectively.

- **Quick Thinking vs. Needs Extra Time and Guidance:** Her work style will be characterized by an ability learn new tasks, methods, and procedures in a reasonable amount of time. She might resist suggestions about what she should do in new situations. Help her deal with the unexpected by learning to ask herself what to do if something goes wrong. As she masters new tasks and procedures, ask her "what if" questions to help her develop the habit of applying what he knows to unknown situations.

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

2. Jane's **Management Style:**

- **Initiates Action vs. Waits for Direction:** She enjoys being in charge of situations and projects and will often take the initiative, especially if co-workers seem to hang back. Help her learn to lead others by example and inclusion rather than simply telling them what to do. If she takes initiative inappropriately, show her how unilateral action can disrupt cooperative group efforts so that she can learn to include and communicate with others and increase cooperation.

- **Willing to Delegate Tasks vs. Micromanaging:** Her management style means that she is able to work as a member of a team when it is required by the job, but she may still at times be seen as too critical and fault-finding, especially if she feels that someone has disappointed her. She may sometimes seem to "micro-manage" subordinates. Encourage her to be very explicit with subordinates about tasks she delegates, as well as deadlines, and then to follow up only when she has made it clear that she will do so. Model supportive follow-through for her in the way that you supervise her.

- **Wing It vs. Plan It:** She has a good balance between "winging it" and planning. She is generally able to balance the need to organize herself with the need to explain her actions and directions clearly to others. If she seems to have difficulty getting organized, or if she seems to spend too much time organizing and planning without actually taking action, it may be that she needs some coaching in how to break down objectives into smaller, manageable actions.

- **Straightforward vs. Timid:** Her management style tends to be "management by memo." To her, asking questions or bringing information to someone's attention feels like an uncomfortable confrontation. Help her understand that there is a difference between appropriate assertiveness and aggression by thanking her whenever she asks questions or raises issues, no matter how indirectly she does it. Avoid reacting with impatience to her efforts to be more direct and straightforward if they seem inadequate. Instead, thank her, answer her questions, or otherwise give her positive reinforcement for overcoming her reluctance to speak up.

- **Abstract vs. Concrete Thinker:** Her management style will be characterized by an ability to learn and adapt to new situations well. She may resist subordinates' ideas if she is sure she understands what to do better than they do. Coach her to encourage collaboration among her subordinates by practicing it herself in her management style.

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

3. **Jane's Dealing with People:**

- **Outgoing vs. Shy:** Her good social skills mean that she meets new people easily, starts and participates in conversations, and enjoys contact with others. An unexpected change in her ability to meet and talk with people may be a signal of problems or stress that are draining her energy, or of an unusual interpersonal difficulty. Make sure that you discuss the effect that either too much, or too little, effort to get along with others may have on her job performance so that you can help her solve a little problem before it becomes a big one.

- **Too Sympathetic vs. Too Unsympathetic:** Her basic friendliness means that she is genuinely likes people and values being pleasant to be around. She will almost always be able to balance her willingness to make the effort to get along with people with the need to hold others accountable for their work. A sudden change, where she seem less tactful than usual or where she allows herself to be taken advantage of, may be a sign of an unusual interpersonal difficulty. Talk to her about such changes so that she, and you, can re-establish her normal good balance.

- **Trusting vs. Cynical:** In her dealings with people, she will usually achieve a good balance between her willingness to trust others and awareness that other people may sometimes have hidden agendas that are counterproductive to the present situation. If she seems to become hypercritical of others, from time to time, follow up with her to discover what other factors may be affecting her interactions with people. It might be as simple as fatigue, or an especially heavy workload. Whatever it is, talk with her about the effect it has on her relationships with other people so that she can get it back in balance.

- **Assertive vs. Not Assertive:** She will deal with people by blending in. She will seem shy and quiet, especially in groups, because she is uncomfortable speaking up or asking questions. In spite of the fact that she often feels that stating her opinion will sound confrontive or aggressive to other people, she will not like it if her contributions are overlooked. Encourage her to share her ideas and opinions by asking for them and listening respectfully when she responds.

- **Thick-Skinned vs. Sensitive:** He will usually maintain good relationships with other people, but she may sometimes react with hurt feelings if others treat her inconsiderately. Teasing her, even with no harm intended, can easily result in her taking the teasing comments personally. If she seems more sensitive than usual, be sure to discuss with her privately any event or comment that could affect her ability to work with others.

- **Spontaneous vs. Cautious:** When she deals with co-workers, she manages her enthusiasm well. She will respond to exciting new projects or achievements appropriately. Unusual impulsiveness or lack of enthusiasm may be a signal that stress is having an adverse effect on her work. Bring this behavior to her attention and explore ways with her to handle the stress more effectively.

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

4. Jane's Problem Solving:

- **Out of the Box vs. Traditional Problem Solving:** She is able to use information to solve new problems or adapt to new situations in a reasonable amount of time. You can help her improve her problem-solving contributions by encouraging her to think, before it happens, about what to do in unexpected situations.

- **Careful vs. Rushed:** She will usually evaluate most problems carefully, thereby avoiding either the first solution that comes to mind or the tendency to over-think the problem and miss the best moment to act on a solution. A pattern of impatiently implementing the first solution that comes to mind may be a signal that stress in some area is having an effect on her judgment. If you see such unusual behavior, bring it to her attention and work with her on better ways to handle the stress.

- **Logical vs. Intuitive:** She has a strong preference for making decisions based on intuition and personal values; she may not be able to provide logical reasons for why she has made a decision. She needs to learn how to identify situations where her decision-making process should be more logical. Help her find logical reasons to explain the rationale for her decisions, in some cases before she takes action on the decision. Make sure that she does not dismiss aspects of a situation simply because they don't seem important to her.

- **Open to New Solutions vs. Prefers the Tried and True:** She will tend to see change in the work place as a problem and will have difficulty seeing the opportunities in change. She will likely resist changes in procedures, routines, or priorities that she has become accustomed to. Help her keep her mind more open to alternative ways of solving problems by encouraging her to think ahead about things that might go wrong and need a new solution.

- **Big Picture Preference vs. Detail Preference:** She approaches problem solving with a good balance of looking at the "big picture" and considering how the details fit into that context. She usually tries to find similarities between a new problem and similar ones she has solved, or seen solved, in the past. If she sometimes gets lost in details, coach her by reminding her about the overall objective or problem to be solved and asking her to look at his priorities again.

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

5. Jane's Mental Toughness:

- 🟢 **Calm under Stress vs. Emotional under Stress:** She will usually deal with unexpected crises well. Nevertheless, be sure that she knows what kind of crises she will be expected to handle and when they are likely to occur. If she shows any signs of concern over her ability to function in a given crisis, review in detail exactly what is expected of her, as well as where she can go to find assistance in preparing for it.

- ➡️ **Even-Keeled vs. Worrier:** She may have difficulty keeping bad moods hidden at work, even when the trigger for her feeling "down" may have occurred outside of work. When she seems "down" or has trouble putting her reaction to mistakes behind her, talk with her privately about how important it is to set the right "tone" at work. Remind her that it is important not to let one's feelings at work become more important than the work itself. Encourage her to set her moods aside by reminding her that other people do not know what is going on inside her; they only know what they see in her behavior.

- ➡️ **Focus on Issue vs. Self:** In most situations, she will be able to separate the demands of a challenging situation from her personal reaction to it so that she can focus on what needs to be done. Occasionally, however, she may get bogged down by her reaction, perhaps because she believes she is to blame, or because she thinks she should have foreseen the difficulty. Coach her by reminding her to first separate the things she cannot do anything about from the things she can, and then focus on the latter.

Behavior Cluster Definitions

The following definitions are intended to provide a general description for each of the Behavior Clusters and do not describe the individual who is the subject of this report.

Work Style Cluster describes the person's overall behavioral style on the job. Is this person dynamic and energetic, constantly in motion, a person who works with endless stamina? At the other end of the extreme, is this a person who works deliberately or even slowly? Will this person plan and organize tasks and activities effectively, not at all, or too obsessively? Does this person conceptualize what needs to be done on the job without following through and doing it or, at the opposite extreme, does this person tend to get lost in the details?

Management Style Cluster describes how a person will lead and direct the activities of others. Does this person enjoy directing others and taking charge of situations? Is this person willing to cooperate with others, delegate tasks, and follow up on performance? Is this person able to give, and receive, advice and suggestions from others?

Dealing with People Cluster describes how this person will interact with people. Does this person like to be around people, or would this person rather work independently? How willing is this person to make an effort to get along with everyone, or to avoid negative interactions? How straightforward and direct will this person prefer to be in interacting with others?

Problem Solving Cluster describes both a person's ability to learn and use information to solve problems and challenges, and a person's preferred way of arriving at decisions. The ability to give oneself time to think through a situation or problem before reacting or making a decision is a key element in effective problem solving, as is the ability to find the most effective blend of logical thinking and "outside the box" thinking.

Mental Toughness Cluster describes a person's ability to manage his or her personal reactions and moods, and willingness to prevent them from affecting performance on the job. Will stressful situations be difficult for a person to handle, or will a person remain calm, focused, and unemotional no matter what is going on around him?

Note: More detailed information about personality-driven work style preferences is available in the Helm and Associates' **Performance Profile REFERENCE MANUAL.**

Click here to return to the Behavior Clusters-Overview

WHAT IS THE INFORMATION IN THE MANAGEMENT POTENTIAL ASSESSMENT BASED ON?

The information in the **MPA** (Management Potential Assessment) is based on how a person responded to statements and questions on the HPI, which measures a person's personality-driven work style preferences that will affect his or her behavior on the job.

The HPI is a validated personality measurement tool that was developed by Dr. Kurt Helm, a licensed and certified psychologist. The validation standards against which it was measured exceed the requirement of the U.S. EEOC and the American Psychological Association. It has been used to measure basic personality factors for over 23,000 individuals in business and industry since 2000.