

# Profiles International Assessments Insurance Case Study

## ACCOUNT MANAGERS IN INSURANCE: DIFFERENTIATING TOP PERFORMERS

A division of a large, publicly traded insurance and benefits company has used assessments in selection of their sales representatives for some time. While they believe these tools have helped them select better people for sales roles over time, they were also open to the possibility that other tools might improve their selection process, especially in selection for positions where selling was not the primary function of the job.

We compared the measures already in place with our tool of choice, the Profile XT™ (PXT) and identified some major differences between the measures. Assessments currently in use rely upon a standardized “Top Performer” pattern, applied for comparison across sales positions, geography and employers. Those measures do not assess cognitive function. Finally, those measures depend on assessment of skills for much of their output. By contrast, the PXT measures cognitive, behavioral and occupational interest areas, which are stable over time. The PXT avoids assessing skills, which can be acquired and lost. Finally, the PXT depends on comparison of individuals with a valid, locally established pattern of success automatically including variations in markets, geography, company culture and management style.

Given that any sample of account managers selected would necessarily be a highly selected sample who were all successful in their jobs and who had held their jobs for a considerable time, we thought it would be interesting to establish whether the PXT could detect significant differences between top performers and bottom performers within that sample.

Using the same performance metrics the company uses to provide regular feedback and evaluation of their account managers, a three-person group of top performers was identified, and a three-person group of bottom performers were also identified. All managers selected completed the PXT. A “success pattern” was created for each measure, based on the assessments of the three top performers.

As the graph below clearly shows, even within this highly selected group of account managers (who would be expected to have a high degree of shared ownership of the critical dimensions of success), the PXT clearly differentiated between the Top Performers and the Bottom Performers. No overlap in match scores occurred between the groups. Further, average match to pattern differed by 15 points between the groups, well beyond the 10 point difference we usually consider sufficient for a test of discriminative power.

Finally, not shown here (out of deference to the client’s proprietary information) six of the 20 scales from the PXT proved to be “killer variables” with clear and consistent differences in scale scores between the groups. Future work with this client is underway to use these findings to improve selection success in a variety of positions.

