



**Insurance Customer Service  
Representative Assessment  
Report**

**Candidate:**  
**Samantha Sampleuser**

**Date:**  
**01/13/2020**

# Insurance Customer Service Representative Assessment Report

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The following pages represent a report based on the results of a psychological assessment. The profile presented below summarizes key results in each area compared against general population norms (indicated by the descriptors Low, Below Average, Average, Above Average, and High) and with norms for high performers in the type of job for which the candidate is applying (indicated by the shaded areas). The candidate's score is indicated by the diamond symbol: ◆

## ALL RESULTS SHOULD REMAIN STRICTLY CONFIDENTIAL

	Low	Below Average	Average	Above Average	High
Agreeableness					◆
Assertiveness			◆		
Conscientiousness					◆
Customer Service / Responsiveness				◆	
Detail Mindedness				◆	
Emotional Stability / Resilience					◆
Extroversion				◆	
Integrity				◆	
Long Tenure Potential					◆
Openness				◆	
Optimism/Enthusiasm				◆	
Orderliness					◆
Work Drive					◆
Overall Cognitive Aptitude					

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## Cognitive Aptitude Assessment

Compared to general adult norms using standardized tests which were validated for a wide range of positions, we estimate Samantha's overall level of general intellectual aptitude to be in the **60-69 percentile** range. Her individual aptitude levels are:

Abstract Reasoning 70-79%ile

Numeric Reasoning 70-79%ile

Verbal Reasoning 30-39%ile

Samantha has a slightly above-average level of general cognitive aptitude. She should be able to handle most of the problem-solving demands of this job in a satisfactory manner.

### Explanation of Cognitive Aptitude Scores:

The aptitude scores in this section reflect percentile rankings -- not percent correct on the test. With percentiles, the average is the 50%ile. Half of the people score below this score and half score above it. As another example, if a person scores 80-89%ile on a specific test in this report, it means that they scored as well as or better than 80-89% of the norm group, but not as high as 11-20% of the norm group.

The **Overall Cognitive Aptitude** is an average of the separate aptitude sections given to this candidate.

The lower the Overall Cognitive Aptitude score, we predict that the candidate will have difficulty learning new information and making decisions. For example, if they are well experienced in their occupation, they may be able to continue to perform well practiced tasks adequately, but have difficulty learning new things. As such, they will need additional training time and more support from supervisors. People who produce lower Overall Cognitive Aptitude scores generally prefer tasks that call for specific responses rather than ones requiring insightful solutions. They are also slower in processing information and are often easily overwhelmed by complex problems, especially ones they have not dealt with before.

The higher the Overall Cognitive Aptitude score, the more we predict that the candidate will learn quickly, pick up a lot of new information on their own without needing to be trained, handle a large information load easily, make decisions in an efficient manner, and show a great deal of insight about how to solve new and complex problems.

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## Personality Assessment

### Strengths:

- She is very motivated to have smooth, amiable working relationships. Samantha is quite accommodating and compliant, particularly when conflict arises. She tries to be civil and polite at all times.
- Samantha can exert influence and speak her mind when it is important for her to do so. However, she is by no means aggressive or overbearing. Samantha is usually willing to go along with others and to accept organizational leadership.
- She is very trustworthy and reliable in the way she performs her job. Samantha fulfills commitments in a highly dependable manner that others can count on.
- Having an above average level of customer service commitment, Samantha works to meet customers' demands in a timely and courteous manner. She often takes time to give extra attention to customers to ensure their satisfaction and repeat business. Samantha also reinforces quality customer service among the people who report to her.
- She is careful and detail-minded in how her work is performed, and will put in the extra time for error-proofing to make sure the results are accurate and conform to specifications.
- She has a high level of emotional stability and resilience. Samantha copes effectively with job stress and pressure. She is level-headed and collected in times of work crises.
- Samantha is fairly sociable, outgoing, and amiable in her work-based interactions. She will usually be an effective communicator.
- Samantha registers as having a sound level of integrity and honesty. She is unlikely to do things which others would consider to be improper, immoral, or dishonest.
- She prefers to form a strong attachment to one company and is unlikely to want to leave for another job. When problems arise at work, Samantha is more likely than most to tough them out rather than quit in frustration.
- She is typically willing to try new ideas and practices on her job. Samantha is likely to be receptive to continuous improvement programs and innovation initiatives in the workplace. She will make an effort to learn new job-related knowledge, skills, and abilities.
- Samantha is often optimistic in her outlook. She usually expects good things from her job and the situations she encounters at work. Samantha will seldom become demoralized by setbacks and will keep a positive attitude in the face of problems.
- Samantha is systematic in the way she works. She strives to be efficient in her work. Samantha appears to have good organizational skills.
- Samantha has a high work drive. She willingly invests a lot of time and energy into meeting the demands of her job, even when long hours are required.

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### Developmental Concerns:

- As someone who aims to be known as pleasant and easy-going, Samantha is likely to avoid dealing with difficult issues that would reveal underlying conflict or disagreement. If she participates in the senior management team, she will have a tendency to go along with the majority no matter what her own opinion.
- Samantha may need to be more strong-willed and assertive in some situations. She should let others know what she really thinks or feels about things at times.

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## INTERVIEW QUESTIONS

After reviewing the assessment results for this candidate, you may want to conduct a structured interview to further explore and clarify some specific concerns. The interview questions listed below reflect areas of concern raised by the assessment results. You should keep asking questions until you have gained confidence in your assessment of the candidate. You can use some or all of these questions when interviewing the candidate. You will probably want to customize these questions to best fit your style and what you already know about the candidate as well as the job for which s/he is being considered. Most of these are behavioral description items which ask the candidate to describe specific behavior on the job. Some additional probes which you might want to use with individual questions are:

- \* When did this take place?
- \* What factors led up to it?
- \* What were the outcomes?
- \* What did others in the organization say about this?
- \* How often has this type of situation arisen?
- \* How would you handle it differently in the future?

## AGREEABLENESS

- Tell me about a project that required everybody to get along smoothly and harmoniously . What did you do to help promote harmony and cohesion?
- Sometimes it is good to question or challenge the ideas or decisions of the people you work with, even if it leads to disagreement or an argument. Tell me about a time when you have done so.
- Describe a situation where you took a stand on something that was not necessarily popular with other people, but where you felt it was the correct thing to do?
- Tell me about a situation where you went along with the group (or with individual coworkers) just to keep the peace, preserve harmony, or show support, even though you did not agree with them.
- Conflict seems to be inevitable in most work settings as business competition increases and more demands are made on all employees. Tell me about a conflict or disagreement you had with another employee? [Probes: What was the nature of the problem? What did you do to help resolve it? How often has this occurred?]

## ASSERTIVENESS

- Describe a time when you took charge of a difficult situation in your organization and turned it around into a success.
- Describe a time when you spoke up on a matter of importance to you, even though you knew it would not be well-received or when others in the company opposed you.
- Tell me about a time you took the initiative to get a project started or to complete it in a timely manner.
- What would you do if you felt that your boss had been ignoring you or not paying attention to your ideas?
- Describe a time when you successfully confronted a problem situation that others had trouble dealing with in the past.

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- Tell me about a time when you effectively negotiated with upper-management to get them to accept your recommendation over the recommendations of others.

### ORDERLINESS

- Tell me about a time when you organized the elements or parts of a project into a larger whole and came up with an integrated system.
- Describe how you use details to make plans and develop long-term strategies.
- Tell me about a time when you were so focused on details that you got bogged down and spent too much time on a task or assignment.
- Describe your approach to doing long-range planning and strategic development on your job.

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