

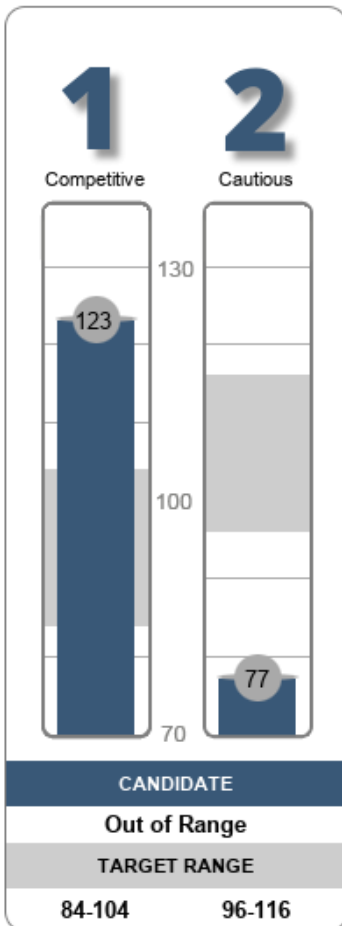
Client Name: Omnia Report Samples  
 Client Number: 20-SAMPLES  
 Candidate Name: Sam Sample  
 Job Target: Teller - Bank  
 Target Number: 228680  
 Profile Number: 1675882WB  
 Report Date: July 11, 2023  
 Dept./Div.:  
 Compatibility Rating: Low

## Rating Summary:

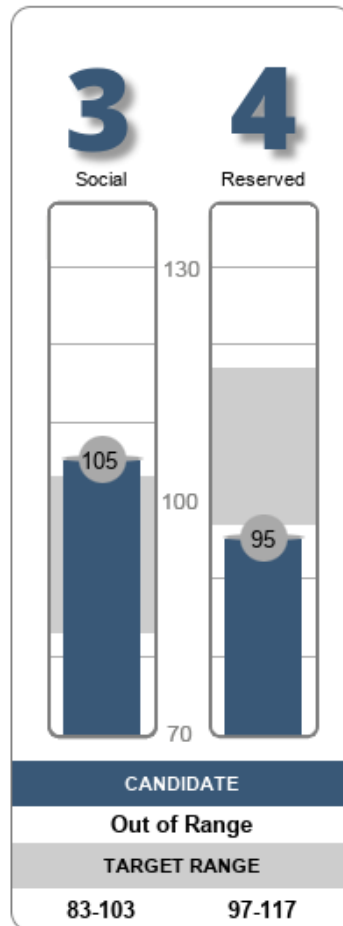
The candidate scored LOW compared to your Job Target. This occurs when the behavioral traits (Columns 1 – 8) and/or the performance measures (Energy, Perspective, Intensity) do not fall within the Target Range.

A low rating also occurs when the primary column falls below the Target Range even if all other columns are in range. Significant management concerns may exist to explore further during the interview process.

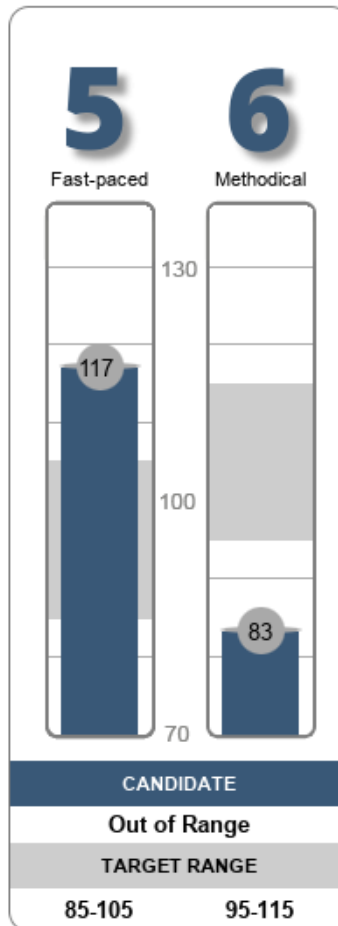
## Assertiveness



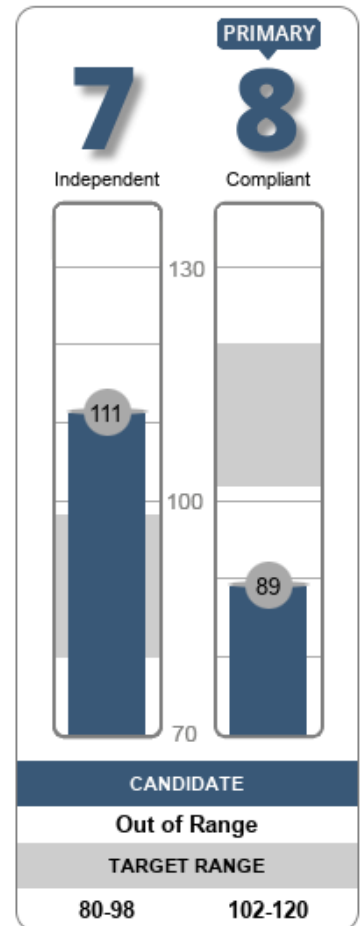
## Sociability



## Pace



## Structure



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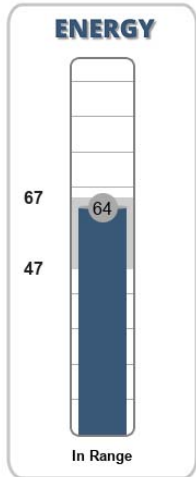
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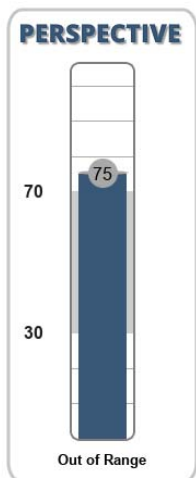
Target Number: 228680

## COMPARISON TO TARGET



The candidate selected an average number of words on the assessment.

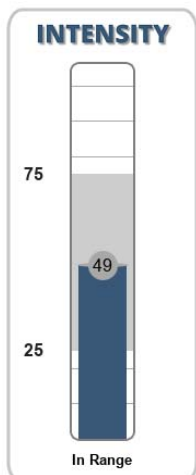
An in-range Energy score suggests an ability to efficiently process information and adequate stamina for a typical workweek.



An above-range Perspective score indicates acute concern for the correctness of one's actions.

The candidate may have unusually high standards and could dwell on even minor decisions.

An above-range Perspective could also indicate the presence of stress.



Intensity measures the strength of an individual's personality traits.

An in-range score indicates the candidate has clearly defined personality traits and good focus. It should be possible to identify workplace needs and effective motivational strategies.

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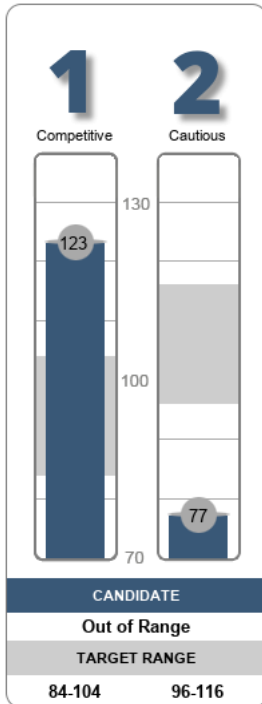
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## COMPARISON TO TARGET

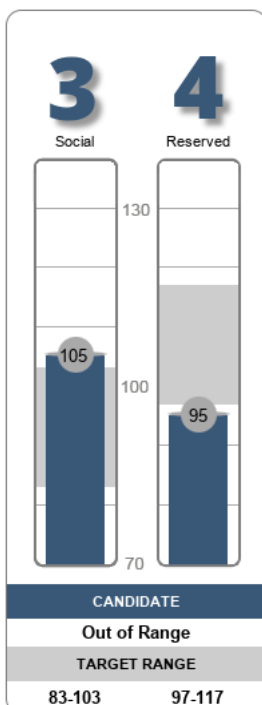


This candidate scores above the target range for assertiveness. **Summary:** Participant is more assertive, less cautious than the target teller.

**Strengths:** Self-starting, proactively cross-selling your bank services to customers, taking initiative to resolve service issues, assertively dealing with difficult customers or coworkers.

**Challenges:** Might be more focused on pursuing individual goals than being a team player. May not be content in a service-oriented position long term. May sometimes come across as aggressive, pushy, or confrontational when interacting with customers and coworkers.

**Action Plan:** Discuss the candidate's goals to make sure they are consistent with this teller position, and plan a career track. This person probably needs chances to take charge, apply initiative, and solve new problems. To provide the challenge this candidate needs, assign additional responsibilities once core duties are mastered. Use advancement opportunities or financial incentives as motivators. The candidate may have potential for eventually taking on some supervisory duties. However, monitor interactions with customers to ensure an appropriately diplomatic and accommodating service style.



This candidate scores above the target range for sociability. **Summary:** Participant is more social, less analytical than the target teller.

**Strengths:** Making conversation and warmly welcoming people to your bank, establishing rapport with customers and coworkers. Communicating in an upbeat, friendly, empathetic manner. Reassuring customers who are upset or have concerns.

**Challenges:** Working with facts and figures, gathering information prior to solving problems, answering questions in specific terms, objectively analyzing decisions. May not concentrate well on dry financial transactions due to being more interested in talking to people. Could be too vague or general when answering customers' questions.

**Action Plan:** Advise the candidate to keep extraneous conversation to a minimum when processing transactions. Offer coaching on what steps to take and what information to gather when resolving problems for customers. Make sure the candidate provides specific data when answering customers' questions; it may be helpful to role-play some service interactions. This person enjoys being in the spotlight, so offer public praise and special awards for a job well done.

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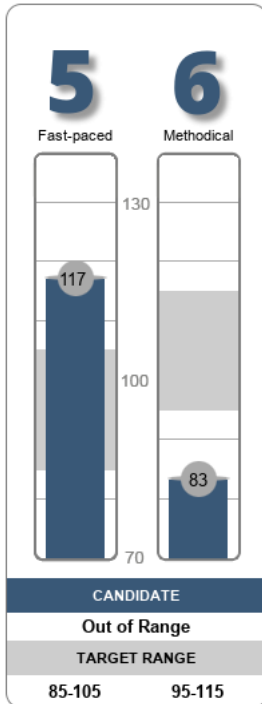
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## COMPARISON TO TARGET

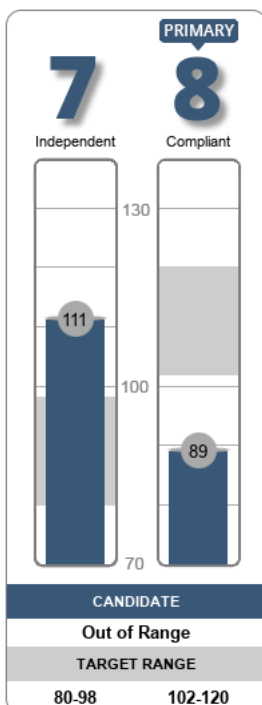


This candidate scores above the target range for sense of urgency. **Summary:** Participant is more time sensitive, less patient than the target teller.

**Strengths:** Handling transactions as quickly as possible, minimizing customers' wait time, multitasking to handle different people's needs at once, dealing with interruptions, adjusting to new priorities.

**Challenges:** Waiting on slow customers who need extra time. Following a predictable daily routine. Focusing on lengthy or repetitive duties. Could rush through transactions in order to finish them rapidly and move on to the next person in line. Might get overextended by trying to do too much at once.

**Action Plan:** Make sure the candidate takes sufficient time to handle each customer's transaction thoroughly; discourage rushing. Help this person understand what tasks take priority, and encourage the use of organizational tools and checklists. Consider assigning side projects or cross-training to provide a break from the usual routine or to fill up downtime during slow periods. This person focuses best on short-term goals.



This candidate scores above the target range for independence. **Summary:** Participant is more independent, less structured than the target teller.

**Strengths:** Working self-sufficiently, deciding on a course of action without needing clear guidelines, finding innovative ways to handle service issues and meet bank customers' needs. Focusing on results and seeing the big picture. Shrugging off criticism from customers or supervisors.

**Challenges:** Closely following bank procedures or supervisors' instructions, paying attention to details, double-checking work for accuracy. May overlook information or make oversights, may not seem meticulous about handling customers' transactions.

**Action Plan:** Make sure this candidate refers to bank procedures when making decisions. Agree on some ground rules up front, but try not to manage the candidate too closely as long as they are consistently cooperative and observe rules and regulations. Involve this person in setting their goals, instead of dictating objectives, to ensure a greater interest in pursuing them. Audit detail work frequently, and help the candidate develop a good system for catching oversights and ensuring the accurate processing of transactions.

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## CANDIDATE'S KEY TRAITS

This summary is based on the highest of the 8 columns. This page is **ideal for use with employee coaching**.

Goal-driven, aggressive competitor who plays only to be first or best. Very comfortable with confrontation and risk; at times could have significant difficulty backing down or taking a non-leadership role in group or team settings. Strives to create or discover new opportunities and make things happen. Candidate is likely driven by individual performance-based pay such as commission. Highly ambitious; candidate may have to make an effort to create realistic, attainable business goals. More authoritative and demanding than supportive.

People-oriented, upbeat, and communicative. This candidate could find it challenging to stay motivated in a job with limited people contact. Likely to establish relationships with people easily; may be a good motivator, networker, and promoter. Tends to rely somewhat more on emotion and enthusiasm than on technical or detailed information when attempting to persuade. Generally more instinctive than analytical or technically-minded. Strives to project a favorable image and appreciates public recognition.

Fast-paced and impatient. This candidate fits well in a time-driven environment where deadlines might be given or altered with short notice. Comfortable multi-tasking and adapting to new situations, priorities, or schedules. May have to make an effort to finish tasks before starting another; potential for overextension. This is a flexible individual who could quickly become frustrated with routine, repetitive tasks.

Independent decision-maker who follows important rules but prefers general guidelines to formal, explicit procedures. This candidate is a self-manager without an unreasonable need for autonomy. Wants to know what needs to be done rather than how to do it. Candidate is comfortable making decisions with a basic understanding of expected outcomes. Deals relatively well with criticism. Not naturally attentive to details; may have to make an effort to maintain high accuracy levels with tasks like reporting and documentation. Could have difficulty staying organized and motivated in positions requiring meticulous attention to detail and strict compliance.



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## DEVELOPMENT INSIGHT

The following sections provide an overview of the behavioral characteristics and preferences when a participant falls within the Target Ranges.

### COMMUNICATION STYLE

**If your candidate has a tall:**

**Column 1:** Assertive, proactive communicator.

**Column 2:** Cautious, low-key communicator.

**Column 3:** Warm, outgoing, and personable. Takes the time to cultivate relationships with bank customers and soothes their concerns with empathy. May explain complex financial transactions in easily understood terms.

**Column 4:** Factual and specific, expresses information concisely. Informative when answering questions from customers and explaining your bank's services but prefers to keep small talk to a minimum.

**Column 5:** Speaks quickly; can jump around, especially with a tall column 3.

**Column 6:** Speaks deliberately, doesn't rush.

**Column 7:** Speaks confidently but could gloss over/miss necessary details.

**Column 8:** Speaks specifically, very thorough, uses details.



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## DEVELOPMENT INSIGHT

### STRENGTHS

**If your candidate has a tall:**

**Column 1:** Proactive, can speak up to tell customers about additional bank products and services.

**Column 2:** Displays a service-driven attitude and a willingness to assist or serve others. Collaborates with other people toward a common goal and is motivated to resolve customer concerns.

**Column 3:** Engaging communicator who can establish warm rapport with customers and colleagues. Enjoys working with people throughout the day.

**Column 4:** A good listener who analytically assesses customer needs. Comfortable handling complex transactions that benefit from solitary focus.

**Column 5:** Time sensitive and multitasking. Can efficiently contend with busy days with many people in the bank waiting for assistance.

**Column 6:** Comfortable handling repetitive or sequential functions. Organized. Strong sense of follow-through.

**Column 7:** Makes decisions self-sufficiently. May bounce back quickly from setbacks or when dealing with an irate customer.

**Column 8:** Strives to meet expectations, abides by established bank procedures. Accuracy conscious with cash handling, data entry, and paperwork.



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## DEVELOPMENT INSIGHT

### CHALLENGES

#### If your candidate has a tall:

**Column 1:** Might feel underutilized in a service-oriented role. Could try to act with authority or seek faster advancement than you envision for this position.

**Column 2:** Could hesitate to take initiative in new areas or resolve conflict. May not feel comfortable proactively cross-selling additional bank products or services

**Column 3:** Might become distracted by opportunities to converse with others. Might generalize when answering questions or giving information.

**Column 4:** Could seem too serious or distant when interacting with customers, may not verbally express empathy.

**Column 5:** Could rush through time-consuming activities or hurry customers through their transactions.

**Column 6:** May find it stressful to multitask a great deal or work very quickly to accommodate unusually busy periods or staff absences or shortages.

**Column 7:** Could do things their own way, might miss errors or omissions in transactions and other work.

**Column 8:** May delay making decisions when risk or uncertainty is involved, when people are likely to be upset by the outcome, or when there is an absence of clear procedures to follow. May be defensive or sensitive to criticism.

### PACE

#### If your candidate has a:

**Tall column 5:** Quick pace, multitasking, and adaptable. Time sensitive when assisting customers and adjusts easily to priority shifts and other changes. Comfortable meeting fast deadlines.

**Tall column 6:** Methodical, steady, and unhurried. Patient to see lengthy transactions to completion and not one to rush customers through the service process. Favors working within a routine.

**Balance of columns 5 and 6:** Combines persistence with urgency. Modifies speed based on the needs of the day. Can handle a few tasks at once but wants to maintain a general sense of order within work.



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## DEVELOPMENT INSIGHT

### ATTENTION TO DETAIL

#### If your candidate has a:

**Tall column 7:** Limited attention to detail, more big-picture orientation. Favors focusing on the overview and end results more than the particulars involved in accomplishing those results. Could inadvertently overlook errors or omissions when performing financial transactions.

**Tall column 8:** Strong focus on details. Careful when dealing with sensitive and confidential customer information. Checks work for mistakes and makes sure transactions are processed accurately. Follows procedures closely to avoid taking the wrong action.

**Balance of columns 7 and 8:** Combines a focus between important details and the overview. Quality conscious but not perfectionistic. Compliant to essential procedures but can make decisions independently.

### MOTIVATIONAL STRATEGIES

#### If your candidate has a tall:

**Column 1:** Individual challenges. Performance-based incentives for selling new bank products and services to customers. Opportunities to grow and advance quickly.

**Column 2:** Team-oriented goals and rewards. A collaborative, harmonious atmosphere. Managerial support when dealing with irate or upset people.

**Column 3:** Recognition, public praise, interaction with customers and other people throughout the day.

**Column 4:** Opportunities to grow job knowledge and skills, being seen as a subject matter expert, specific feedback.

**Column 5:** Task variety, changes of pace, short-term goals, chances to shift gears regularly.

**Column 6:** Routine, predictability, advance notice about changes, time to prepare for new priorities.

**Column 7:** Latitude to try new methods and self-direct. Focusing on the overview and end result.

**Column 8:** Clear procedures to follow. Appreciation for a strong commitment to precision. Diplomatic feedback.

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## DEVELOPMENT INSIGHT

### DEMOTIVATORS

**If your candidate has a tall:****Column 1:** Lack of challenges and job growth or advancement. Working anonymously in the background.**Column 2:** Having to deal with confrontation, working with very competitive or aggressive people. Having to ambitiously market bank products and services.**Column 3:** Socially isolating responsibilities, not having successes recognized or praised. A great deal of data-driven work.**Column 4:** Being evaluated in a subjective manner. Public recognition could sometimes feel embarrassing. No breaks to regroup from lengthy people interaction.**Column 5:** Extensive routine and predictability. Having to perform the same tasks every day. Lengthy or time-consuming duties.**Column 6:** Having to adjust to unexpected changes quickly or frequently. Tight time constraints and frequent interruptions.**Column 7:** Strict procedures that leave no room for interpretation or innovation. Being responsible for minor details.**Column 8:** Harsh critiques and having attention called to mistakes. Having to make independent decisions in unfamiliar situations.

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## DEVELOPMENT INSIGHT

### ACTION PLAN

#### If your candidate has a tall:

**Column 1:** Give this individual goals for cross-selling to customers, and provide performance-based incentives. Clearly outline a path for advancement within the bank. Coach on collaborating on team objectives and acting in a service-oriented capacity.

**Column 2:** Provide support when this person must deal with irate or confrontational people. Add to responsibilities gradually, but encourage greater initiative with time. Coach on proactively suggesting additional bank products and services to customers.

**Column 3:** Praise contributions and successes publicly, and give awards and perks for a job well done. Encourage this person to set aside time to handle intricate duties in a quiet area when possible. Coach on task focus and minimizing distractions.

**Column 4:** Provide opportunities to learn new skills. Offer job-specific feedback and appreciation for expertise. Conduct formal performance reviews at regular intervals. Coach on establishing rapport with customers and coworkers.

**Column 5:** Set short-term goals that will let this teller feel a frequent sense of accomplishment. Provide tools to remind this person when to follow up on outstanding tasks. Coach on follow-through and organization.

**Column 6:** Give advance notice of deadlines and changes. Allow this teller to work in a routine manner. Limit interruptions when possible. Coach on contending with multiple demands and adapting to change.

**Column 7:** Let this candidate know which processes are critical to follow and where new approaches can be used. Give tools to help double-check transactions and confirm the accuracy of work. Coach on handling important details.

**Column 8:** Clearly outline preferred methods for handling problems and duties, and be available to provide guidance, especially at first. Offer feedback in a diplomatic, private way. Coach on working with greater self-sufficiency as experience is gained.



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## SUPPLEMENTAL QUESTIONS

The following behaviorally-based questions are a supplemental tool we provide to help you better evaluate the candidate. They are not a substitute for your standard set of interview or professional development questions, but can provide additional, helpful information or prompt conversation.

1. Have you ever misspoken during an interaction with a customer? How did you recover and move on?

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2. If you become distracted by things going on around you, what do you do to help strengthen your focus on the task in front of you?

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3. If you had to choose one quality as your most outstanding characteristic, what would it be? Why?

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4. What do you do to make sure your work is accurate and compliant?

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5. What new challenges or advancement opportunities would you like to take on in the next few years?

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6. What time-management strategies and tools do you use, and how do they help you keep your workload organized and follow through with assignments?

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