

## Welcome to The Predictive Index®

Congratulations! You’ve taken the first step to creating a competitive culture and achieving desired business results by investing in The Predictive Index (PI) software. The ADVISA team looks forward to partnering with you as you maximize your investment in the software.

At ADVISA, we believe there are **five drivers\*** to create and maintain a **cultural competitive advantage**:

- Activation from above
- Trust and shared purpose
- Leader effectiveness
- Actionable people data
- Systems that support leaders

The PI software is a trusted system to provide **actionable people data**, leading to **effective leaders** – and, most importantly, your desired culture.

This guide is intended to support you during your onboarding and program implementation for hiring, inspiring performance, and driving engagement in your organization.



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*\*Interested in learning about the additional culture drivers? Take our [free Navigator survey](#) to see how your company currently measures up in the five drivers of a competitive culture*

## ADVISA: Your Culture Partner

ADVISA is a leadership consultancy headquartered in Carmel, Indiana, founded in 1986 upon the belief that great leaders create vibrant work cultures with engaged, highly, productive people who make their families and communities better places.



ADVISA is an **Elite Certified Partner of The Predictive Index** talent platform and was originally known as ‘the PI people.’ Since then, ADVISA has developed a proprietary process that helps each client organization transform their work culture into a sustainably loved workplace – which reduces turnover, boosts productivity, and drives growth.

ADVISA provides assessments, customized learning experiences, and strategic consulting and coaching to help leaders more effectively:

1. Diagnose whether their people are ready, willing and able to execute the strategy.
2. Design the org structure to support the achievement of desired results.
3. Hire for job fit.
4. Inspire Performance.
5. Engage hearts and minds to create a healthy, magnetic work culture

ADVISA is a proud Elite Certified Partner of The Predictive Index® - a global, a scientifically validated talent optimization platform that helps leaders align their people strategy with their business strategy.

## First Steps

Through our 30+ years of experience, we have found that programs that launch strong are **82% more likely** to maximize their return on investment within the first year. The first 90 days of a program are critical in setting the foundation.

So, what are the key next steps?

### Prep + Integration

Before asking people to take the PI survey, you'll want to pull together key employees to create an **internal implementation team**. This team will be tasked with designing a communication plan, timeline, role clarity, and goals that should be in place. Tactical steps, like embedding the PI survey into your applicant tracking system (ATS) or HRIS system, are key pieces of the puzzle to help automate PI as a tool. [See page 4.](#)

### Training

There are a variety of training options to meet your specific outcome and audience needs. Knowledge transfer is a very important component of success in achieving desired business results with The Predictive Index. ***At minimum, ADVISA recommends Executive Champions and Program Owner(s) complete training before rolling out across the organization.*** From Program Owners and Executive Champions, to managers, to frontline staff, each level of the organization should know the correct amount of information. The more people trained, the more capable the organization will be to successfully drive change and management. It also creates a common language that drives culture change. Getting the right people trained at the right time develops leaders and optimizes talent. For more information on training options, contact your Consultant or visit our [Trainings + Events page](#).

### Collect Data + Launch

All employees should be informed about what PI is, the vision for its use within the company, and why they should take the behavioral assessment. Sample verbiage can be found on our [Client Resources page](#) to communicate to all employees what The Predictive Index is, how it will be used, and how it will benefit the organization. Most notably, PI helps leadership best engage and motivate people for maximum performance and engagement. It is a tool that helps develop leaders, protect intentional culture, and create high-performing teams.

## Build an Internal Implementation Team

Organizations that maximize their return on investment think strategically and tactically around their people and processes. As you imbed PI into your people strategy, focus on an approach that best optimizes your talent at the intersection of a business plan and achieving desired business results.

Are employees (**job fit**), willing (**motivation + engagement**), and able (**skills + tools**), to execute against the strategic plan?



For a talent optimization plan to be successful, it's crucial to have both strategic and tactical support:

- Strategic support comes from those developing the business strategy. We call these people **Executive Champions** and they believe personal growth directly impacts organizational growth.
- Tactical support is the team leading The PI program and plays a vital role in the success of the people strategy.

To achieve desired results, members of both teams should be:

- Trained
- Proficient in the software
- Using PI as a tool to maximize their impact day in and day out

## Five Key Internal Roles

PI Programs with the highest success rate are intentional about talking about the roles below and assigning at least one accountability person to each one (note: one person could perform multiple roles).

### Program Owner

Internal champion for the PI program and **main point of contact** between the organization and ADVISA. Responsible for the oversight, project management, and quality control of how the organization uses PI. This person is **the tactical champion** who ensures PI is baked into all processes to leverage this data daily.

### Administrator

Responsible for **administering PI surveys** to employees and applicants at the appropriate times. Responsible for mastering the PI software. **Supports the Program Owner** in making sure PI data and tools get to the internal users when they need them.

### Executive Champion

Believes PI is the **tool to achieve the organization's strategic objectives**. They have an eye on where the company wants to go and see people as the vehicle to achieve those desired results.

### Manager

Leader in the organization who has oversight of other employees. Will **leverage data and tools** to build confidence, improve communications, and motivate and engage their team to develop users.

### Interviewer

Involved in the hiring process and uses PI to **confirm behavioral fits** and explore **potential gaps** between a person's PI pattern and the job. This person is equipped to land top talent and determine culture fit.

An **ADVISA Consultant** is also a critical member of your team who will provide support through the onboarding and implementation process.

## Now What?

Now that your team has been assembled and you've launched PI throughout the organization, there are several ongoing resources to use and leverage through goal-setting, communication planning, and more:



### ADVISA Consultant

Connecting with your Consultant regularly and consistently is a critical step. Each Consultant provides **quarterly meetings** to reflect on software usage data to take action, goal accountability, and help you thread PI into additional leadership effectiveness and culture opportunities.



### Client Resources Page

Once training is completed, you'll receive access to the Client Resources page. The ADVISA team offers on-demand resources to help the implementation team and users better understand PI, ensuring adoption and integration of the PI software.



### Defining Key Jobs

If you have the Hire module, starting the process of defining a Job gives you a clear benchmark when collecting PI behavioral data in the application process. We recommend starting with a high turning, high volume, or open position.



### Software

It is imperative that users are fluid in the PI software. We want you to find what you need quickly and easily. The ADVISA team offers **free, monthly software demos** for new users. Clients may also schedule a closed session.