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# HOW TO IMPLEMENT PREDICTIVE INDEX

POST-TRAINING + BEYOND

ADVISA is a leadership consulting firm and we exist to improve the world one leader at a time. We help leaders optimize their talent to achieve desired business results. ADVISA provides assessments, customized learning experiences, as well as 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 Certified Partner of The Predictive Index® – a global, scientifically-validated talent optimization platform that helps leaders align their people strategy with their business strategy.

This guide is intended to support you when using The Predictive Index for hiring, inspiring performance, and driving engagement in your organization.

## TABLE OF CONTENTS

# The most successful teams build a solid foundation.

Organizations that maximize their return on investment think strategically and tactically around their people and processes. As you imbed The Predictive Index® 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?

| | PROCESS | PEOPLE |
|---|---|---|
| **STRATEGY** | **Strategic Planning**<br><br>Build your strategic road map to achieve business results. | **Talent Optimization**<br><br>Develop leadership that effectively aligns your people strategy to your business strategy. |
| **TACTICS** | **Business Systems**<br><br>Ensure the systems of your organization (HR, Finance, Sales, etc.) run smoothly. | **Performance Management**<br><br>Measure engagement and manage performance gaps to build a better workplace. |

For a talent optimization plan to be successful, it's crucial to have support from those developing the business strategy. We call these people **Executive Champions** and they believe personal growth directly impacts organizational growth. From a tactical lens, the team leading The Predictive Index program plays a vital role in the success of the people strategy. To achieve desired results this team should be **trained, proficient in the software, and using PI as a tool to maximize their impact** day in and day out.

**ROLES**

There are five main roles we recommend.

PI programs with the highest success rate are intentional about talking about the below roles and assigning a 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 people champion who ensures PI is baked into all process to leverage this data point 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 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 PI data and tools to build confidence, improve communications, and motivate and engage their team to develop leaders.

**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 (i.e. the job assessment). This person is equipped to land top talent and determine culture fit.

**Integrating The Predictive Index® System: A Three-Part Framework: Design, Hire, and Inspire**

- **Design** – Define key roles with the job assessment
- **Hire** – Use behavioral and cognitive assessments as data points in the hiring process
- **Inspire** – Integrate this data into structures that support employee engagement

The following framework provides a roadmap for successful Predictive Index implementation.

A successful PI program hinges upon collecting behavioral and cognitive data. To get started, complete the job assessment to accurately benchmark the behavioral and cognitive requirements for each unique job function. This allows you to define and communicate job requirements and equip your leadership to land top talent.

**1. Send out Job Assessments + create final Job Ranges**

The Job Assessment provides objective information about the behavioral and cognitive requirements of any job at any level of your organization. It allows all stakeholders to reflect on what is both frequent and important in a job. Once all input is combined, a Job Range is created which reflects the "personality" of the job. There will also be a cognitive range associated with the role. This gives hiring managers concrete benchmarks to use when vetting behavioral and cognitive data.

**2. Use performance data + run group analytics**

Once Job Assessments are completed and cognitive ranges are set, best practice is to analyze the on-the-job performance relative to the targets and benchmarks set. First, group your employees based on performance (top/bottom performers). Then, run group analytics in the PI software. Look for trends in this data to illuminate why some people thrive in the role while others struggle or must adapt. Use this data to adjust and finalize the behavioral and cognitive ranges within the PI software.

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## PI IMPLEMENTATION

Reduce time-to-fill and increase job fit by strategically using the Behavioral Assessment and Cognitive Assessment throughout your hiring process. **Best practice is to gather applicant PI data as early in the application process as possible.** This allows you to observe the fits and gaps between people and positions early and improve the efficiency and effectiveness of each step in the hiring process (i.e., phone screens, interviews, reference calls, etc.)

**1. Integrate an open invitation link for behavioral and cognitive assessment into your application process.**
Having all applicants take the behavioral and cognitive assessments as early in the application process as possible improves time spent on phone and in-person interviews. We highly encourage embedding the assessments into your applicant tracking system. We are here to help you navigate that process—just reach out!

**2. Use Interview Guides to support consistency and accurate fit/gap analysis.**
The Interview Guide compares the final Job Ranges and a candidate's behavioral and cognitive score to confirm fit, expose potential gaps, and pinpoint where a person will need to adapt. The guide provides direction and specific questions that allow for the most targeted interview possible.

It is important to communicate to all employees what The Predictive Index® is, how it will be used, and how it will benefit the organization. Most notably, that the PI system helps leadership best engage and motivate people for maximum performance and engagement. It is a tool that helps develop leaders, protects intentional culture, and creates high-performing teams.

**INSPIRE**

### PI Orientation
The ADVISA Team offers in-person overview sessions as well as on-demand webinars to support the organization's adoption and integration of the PI system. We are happy to schedule this with your team---reach out to discuss additional opportunities!

### Training
Knowledge transfer is a very important component of success in achieving desired business results with The Predictive Index. There are a variety of training options including a half day "What Drives People?", a one day "Managing People to Perform" and a two-day "Becoming a PI Practitioner." The more people trained in The Predictive Index, the more capable the organization will be to successfully drive change and engagement.  It creates a common language that drives culture change. Getting the right people trained at the right time develops leaders and optimize talent.

### Read-back
In order to maximize the long-term effectiveness of your investment, The Predictive Index program purpose, goals, and implementation activities should be socialized with key leaders and managers across the organization. The company should view PI as a tool to reach its strategic objectives. Additionally, the PI Program Owner, or another leader who has attended the Predictive Index Practitioner workshop can provide personal one-on-one PI "read-backs" to key leaders and managers. This generates positive momentum for the program and expands management's mindset for using PI to improve job fit, engagement and productivity.

**PRO TIP: BE INTENTIONAL**
Take your PI program to the next level by weaving behavioral and cognitive data into all employee touchpoints.

**Job Posting**
Knowing what behaviors a job requires allows you to create targeted job postings by choosing words that catch the attention of desired candidates. It equips your leaders to land top talent and communicate job requirements early to concrete consistency.

**Job Descriptions**
People perform best when they have clarity about not only what they need to do/create/achieve, but also HOW they are to behave to be most effective. Lift behavioral descriptions right off the Job Ranges and drop them into job descriptions as behavioral competencies. Not only can you define the job requirements but candidates can see them early in the process.

**Onboarding**
Behavioral and cognitive data illuminate how a person is likely to learn best. Integrate this insight into how you design their learning and onboarding experiences. This data will also allow you to predict new team dynamics to get ahead of developing high-preforming groups.

**Performance Management**
Integrate behavioral competencies into performance management documents to support more meaningful coaching and development. Coaching Guides can also be generated in the PI software and provide a list of relevant questions to open dialogue about how an employee can fine-tune their performance. This allows you to develop your leaders in strategic ways.

**Succession Plans**
Identify and differentiate required behavioral competencies for each level of leadership. Evaluate current talent, identify gaps, and create development plans for high-potentials within your organization.

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**PI IMPLEMENTATION**

## CHECKLIST: NEXT 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?

**CHECKLIST**

### Communicate
Before asking people to take the PI survey, a communication plan and timeline should be in place. All employees should be informed about what PI is, the vision for its use within the company, and why they should take it. We have sample verbiage we can provide.

### Launch
Our Client Service Team is here to work with you on how to best launch the survey. There are a few options in the software and we can help find the one that best meets your needs.

### Training
PI is a knowledge transfer model. Getting key leaders trained is an integral part of implementing the program so everyone is using this data in the same way and gleaning similar insights to take strategic action.

### Applicants
Embedding the PI survey into your application tracking system is a key piece of the puzzle. This automates PI as a piece of data used for all hires.

### Software
It is imperative that folks are fluid in the PI software. We want you to find what you need quickly and easily. The Client Service Team offers demos—please reach out to schedule yours today!

### Defining Key Roles
Starting the process of defining a position 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.