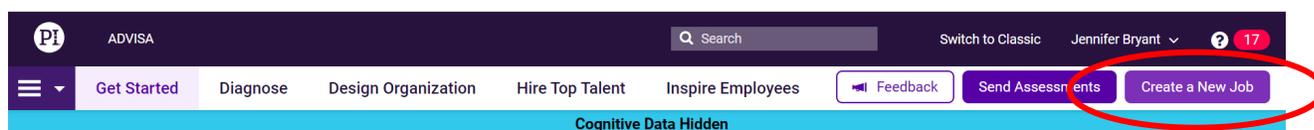




HOW TO SEND OUT THE PI JOB ASSESSMENT (JA)

- The purpose of sending out JA's is to gather data from the position experts to establish the personality and demands of the job, displayed as a Job Target. Send the Job Assessment out to 3-5 stakeholders who know the position well.
- You will want to send an email to the Job Assessment (JA) participant in advance introducing the JA so that the participant can be on the lookout for the email from Predictive Index and understand the basics of the assessment.



If you are entering a job for the first time in the PI software, click on the purple “Create a New Job” button. Enter the name of the job. If this is a new position for your organization, or if you don’t have enough Job Assessment participants, consider choosing from the families of jobs listed. Otherwise, simply choose “No close match”. You may enter a job description (optional). Select the folder where you’d like this job data to live. Usually this will be your Positions folder. Click on “Create Job”.

You will see three options. Select the option “Send to Stakeholders”. If you have any current high performers in the position, you can enter their names here to add their own PI results as a data point (optional). Enter the names and email addresses of 3 to 5 experts you’ll be sending the JA to. Click “Confirm.” You should get a message at the bottom right of your screen confirming that the JA’s were sent out.

If the job already exists in the PI software, find the job by typing it in the search bar and clicking on it. If no JA’s have been completed for this job before, click on Set Job Target and follow the process above, choosing the “Send to Stakeholders” option. If your job already has some JA’s completed but you want to send more, click on “Modify Target”, click on “Manage Stakeholder Input”, click on “Add More Contributors” and fill in the names and email addresses of the participants.

Reach out to an ADVISA team member for advice on next steps after your JA data starts to arrive.