


PROFESSIONAL DEVELOPMENT

**WAKE  
UP  
EAGER**

WITH  
SUZIE PRICE

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# Hiring with TriMetrix

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Helping you create a  
**Wake Up Eager** life.  
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## WHO CAN BENEFIT:

- Curious About TriMetrix
- New to TriMetrix
- Refresher

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## WHAT'S COVERED:

- 1) Why Use TriMetrix and Why Job Fit Matters
- 2) What TriMetrix Measures & How to Read a TriMetrix Candidate Report
- 3) Four Step Process for Hiring with TriMetrix
- 4) Tools to Deepen Hiring and Interview Expertise

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# Why?

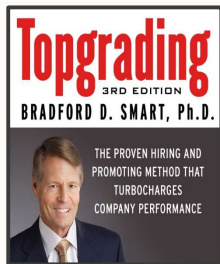
*"The ability to make good decisions regarding people represents one of the last reliable sources of **competitive advantage**, since very few organizations are very good at it."*

Peter Drucker,  
Consultant, Educator, Author

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## Calculating the Cost of Turnover

**Sample Team:** Average Employee Base Salary = \$50,000



A. Employees on Team	25
B. Annual Turnover	2 people
C. Calculate: (1.5) x (Average Salary) = Cost of Turnover <u>Per Person</u>	\$75,000
Annual Cost of Turnover =	<b>\$150,000</b> =(B x C)

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## Top Three Biggest Interview Mistakes?

1. Not being prepared.

2. Overfocusing on background & resume.

3. Not taking notes.

4. Not asking the right questions.

6. Not asking candidates for specific examples of performance.

7. Interviewing alone.

5. Personal bias.

8. Talking too much.

9. Leaning too heavily on gut instinct.

Top 13 Hiring Mistakes Quiz: <https://pricelessprofessional.com/13mistakes>

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In Hiring, There's Always a Risk...



**Reduce the Risk!!**

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Hiring Manager Feedback from a Top TriMetrix User:



*"As a pre-employment tool – it is amazingly effective for putting the right person in the right seat.*

*It helps us dig deeper in the second interview.*

*It helps us figure out where good candidates may be a better fit in a role different from what they interviewed for."*

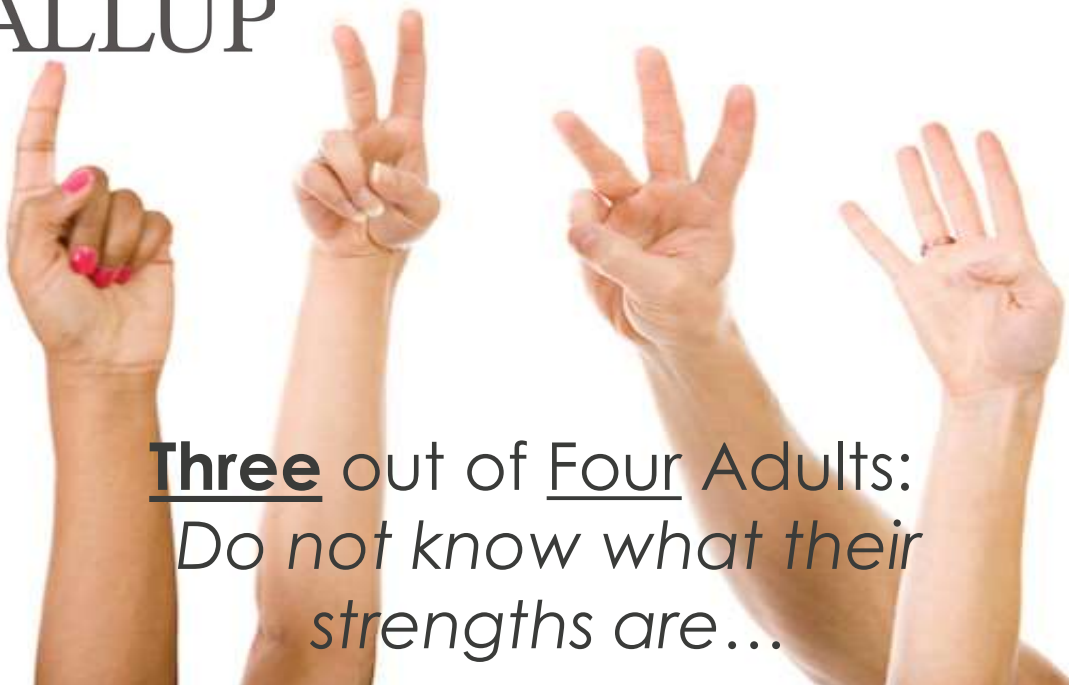
8



Focus on Fit!

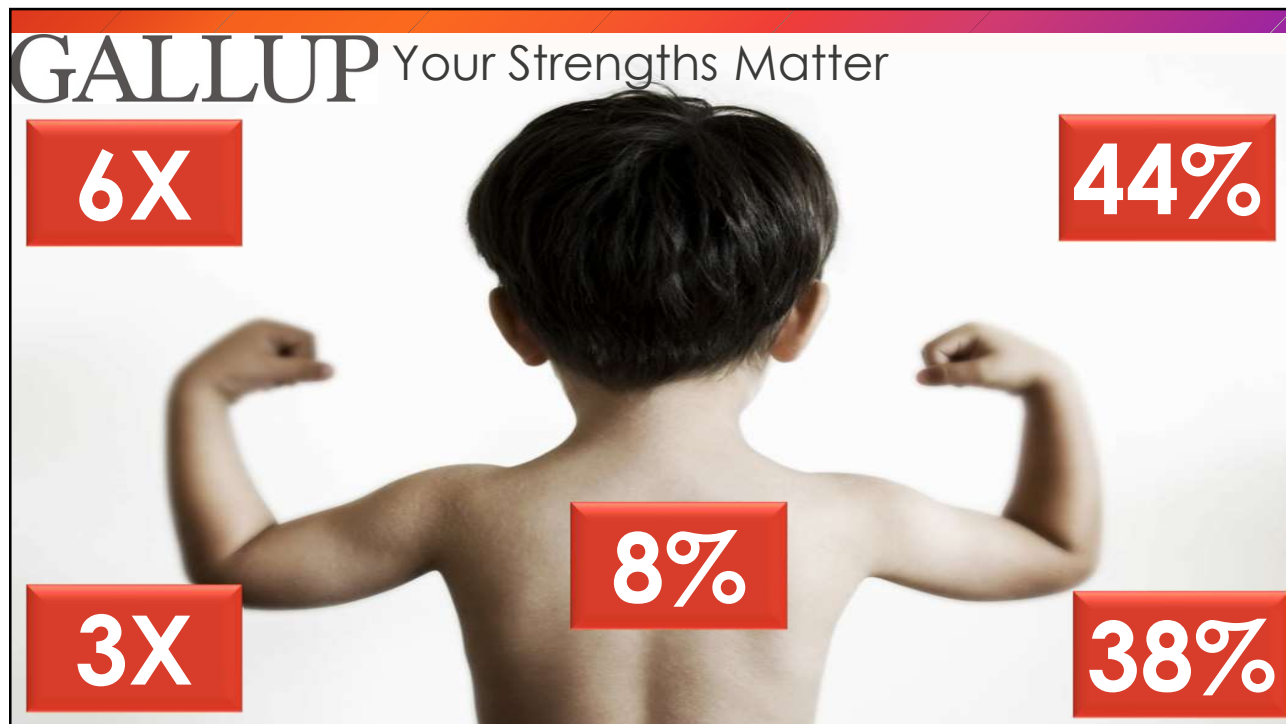
9

GALLUP



**Three** out of Four Adults:  
*Do not know what their  
strengths are...*

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## Three New Hire Attitudes after Six-Months ...



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## What Determines What "Attitude" an Employee Will Have?

1. **Fit for the job.** *(Is this work something I can do and want to do?)*
2. **How someone is managed.** *(Does this company care about me, and do I care about this company?)*
3. **Past habits formed over the years.** *(Requires much effort and focus by the person to change.)*

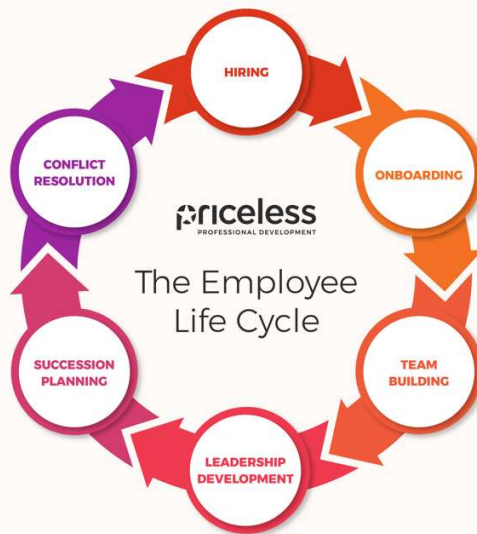
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## Use TriMetrix Throughout the Employee Life Cycle

### SAMPLE CONTENT TO HELP LEADERS LEAD:



#### COMMUNICATING WITH

#### "New Hire Harry"

##### THE DOs

- ✓ Provide ideas for action.
- ✓ Define problems in writing.
- ✓ Clarify parameters in writing.
- ✓ Use a motivating approach.
- ✓ Understand his defiant nature.
- ✓ Provide solutions, not opinions.
- ✓ Flatter his ego.

##### THE DO NOTs

- ✗ Leave decisions up in the air.
- ✗ "Dream" with him.
- ✗ Talk down to him.
- ✗ Drive on to facts and figures.
- ✗ Be dictatorial.
- ✗ Give him unsolicited opinions.
- ✗ Be curt, cold or tight-lipped.



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## TriMetrix – TRI-MODAL – Measures:

**Communication  
& Interaction Style**

**Motivation, Values and  
Interest in the Work**

**Personal Skills &  
Acumen**

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## TriMetrix – TRI-MODAL – Measures:

**< 30%**



HOW WE DRIVE - DISC

**Communication  
& Interaction Style**



GAS IN TANK - PIAV




**Motivation, Values and  
Interest in the Work**



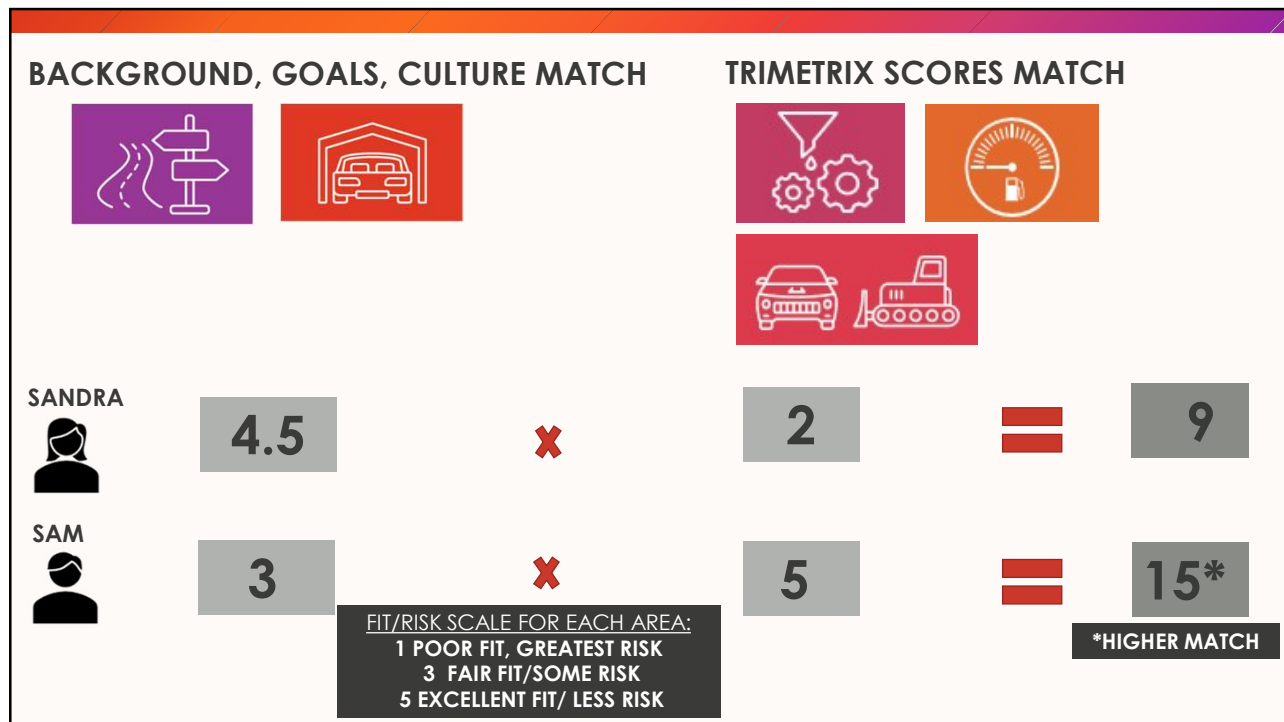
HORSEPOWER – AXIOLOGY

**Personal Skills &  
Acumen**


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What Makes TriMetrix Unique:							
ASSESSMENTS:	MYERS BRIGGS	CALIPER	PRED. INDEX	DISC	FIRO-B	HBDI	TRIMETRIX
 <b>How We Drive –</b> Communication Style	YES	YES	YES	YES	YES	YES	YES
 <b>Gas In Tank –</b> Motivators	NO	YES	YES	NO	NO	YES	YES
 <b>Under the Hood</b> Personal Skills	NO	NO	NO	NO	NO	NO	YES
<b>Sales Acumen –</b> Sales Process	NO	NO	NO	NO	NO	NO	YES
<b>Measure Fit –</b> Match Candidates to the Job.	NO	NO	NO	NO	NO	NO	YES


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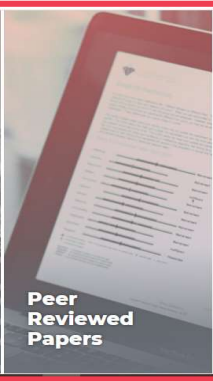
TTI SUCCESS INSIGHTS®




Disparate  
Impact Study:  
Adverse  
Impact




Reliability &  
Technical  
Reports



Peer  
Reviewed  
Papers



White Papers



Case Studies

<https://research.ttisi.com/>

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## Hiring With TriMetrix in Four Steps:



1) Candidate Completes Assessment

2) Select Top TriMetrix Attributes for the POSITION

3) Compare Candidate to Top Job Attributes

4) Use TriMetrix Interview Questions. Consider Match and Next Steps.

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## Hiring With TriMetrix in Four Steps:



1) Candidate Completes Assessment

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## TriMetrix Hiring Process and Resources Document

### STEP 1: SEND ASSESSMENT INSTRUCTIONS AND LINK EMAIL:

Send the Candidate (internal or external) the following **sample email** instructions. Contact Suzie for the correct assessment link.

Hi **CANDIDATE NAME**,

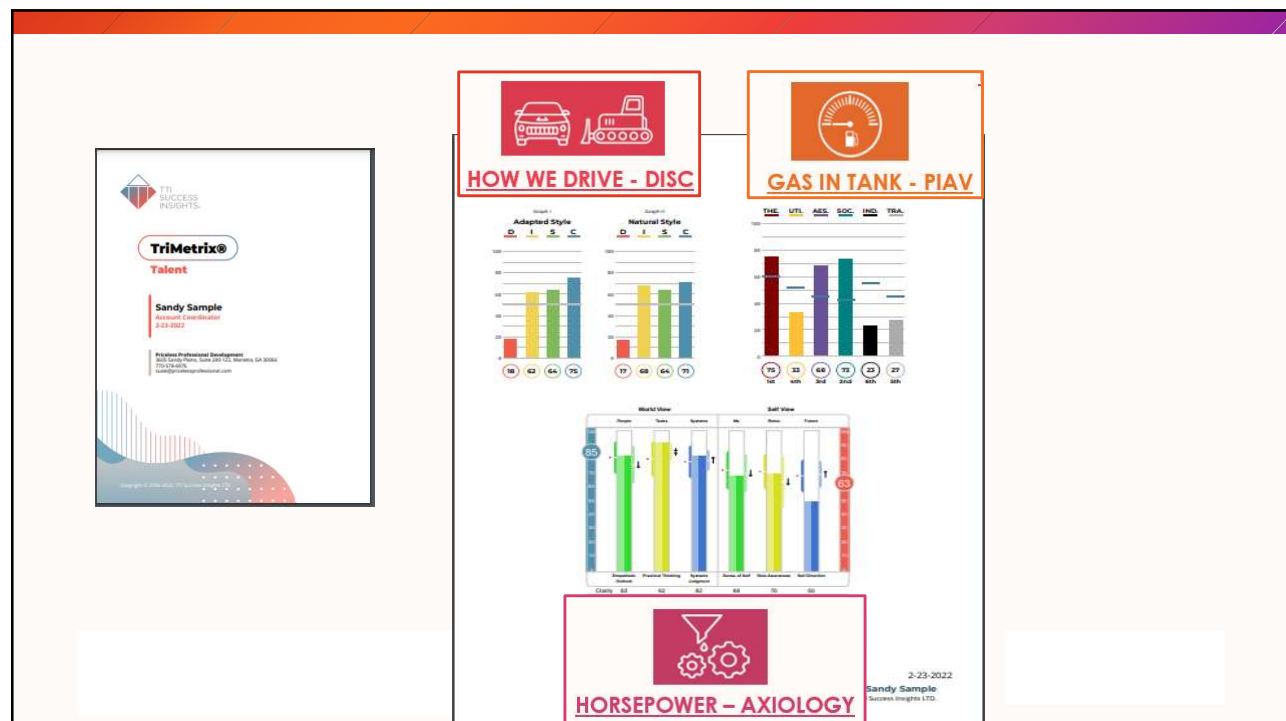
Thank you for interviewing with **COMPANY NAME**. As a part of our Candidate Process, you are asked to complete online assessments. Please read these instructions carefully.

1. Complete these assessments when you are in your **normal** state of mind.
  2. Approach the assessments with an open mind and do what each assessment asks of you.
  3. Complete these instructions in one sitting with no interruptions. (Allow @ 30 minutes)
  4. If possible, use your computer or a larger mobile device, not your phone.
  5. \*\*\*These assessments should be taken in your native language for the best results.
- When you start, if your native language is not English, go to the top **RIGHT-HAND CORNER** for a LANGUAGE drop-down box and select **YOUR NATIVE LANGUAGE**.

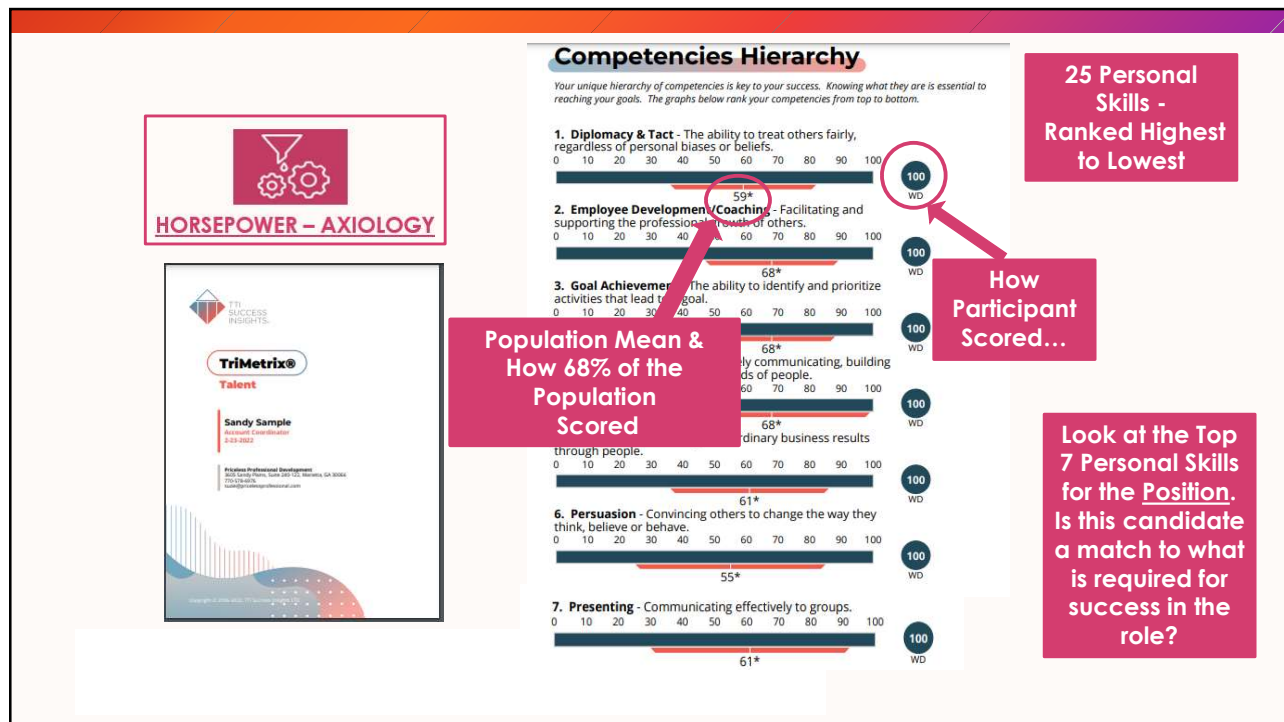
To access and complete your assessment - go to **ASSESSMENT LINK**.

Please reach out to **COMPANY CONTACT INFO HERE** if you have any questions.

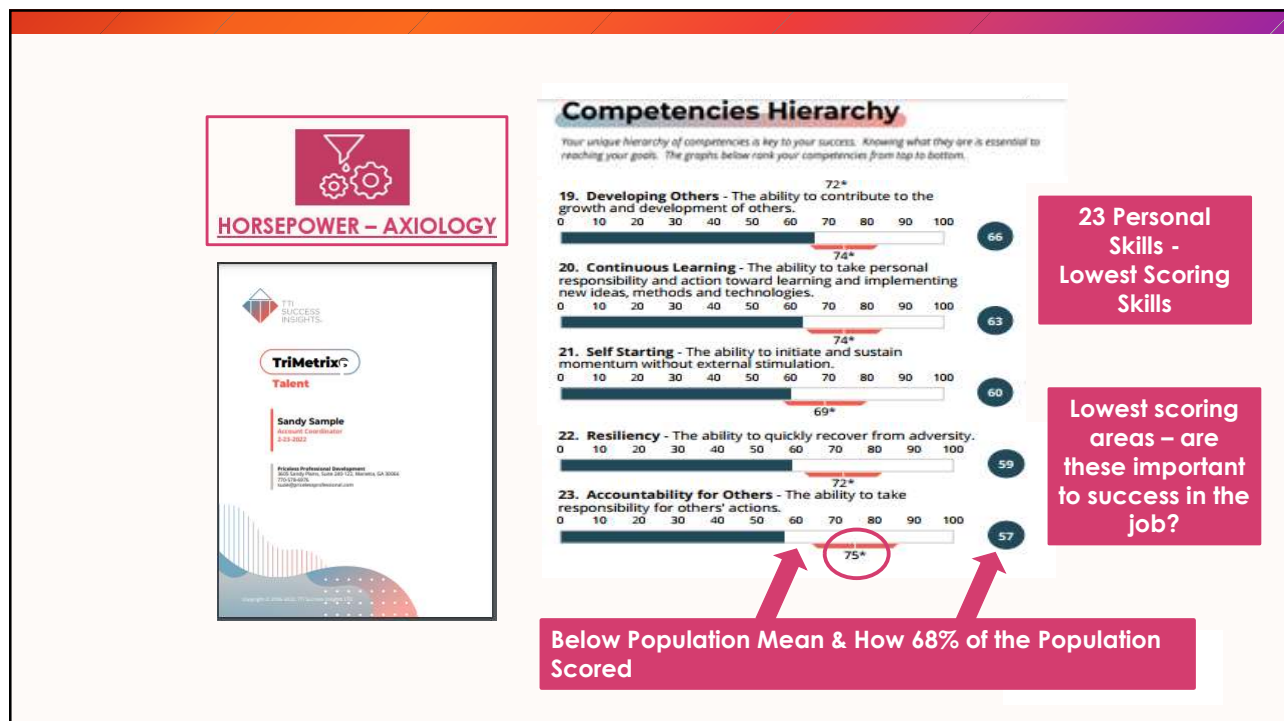
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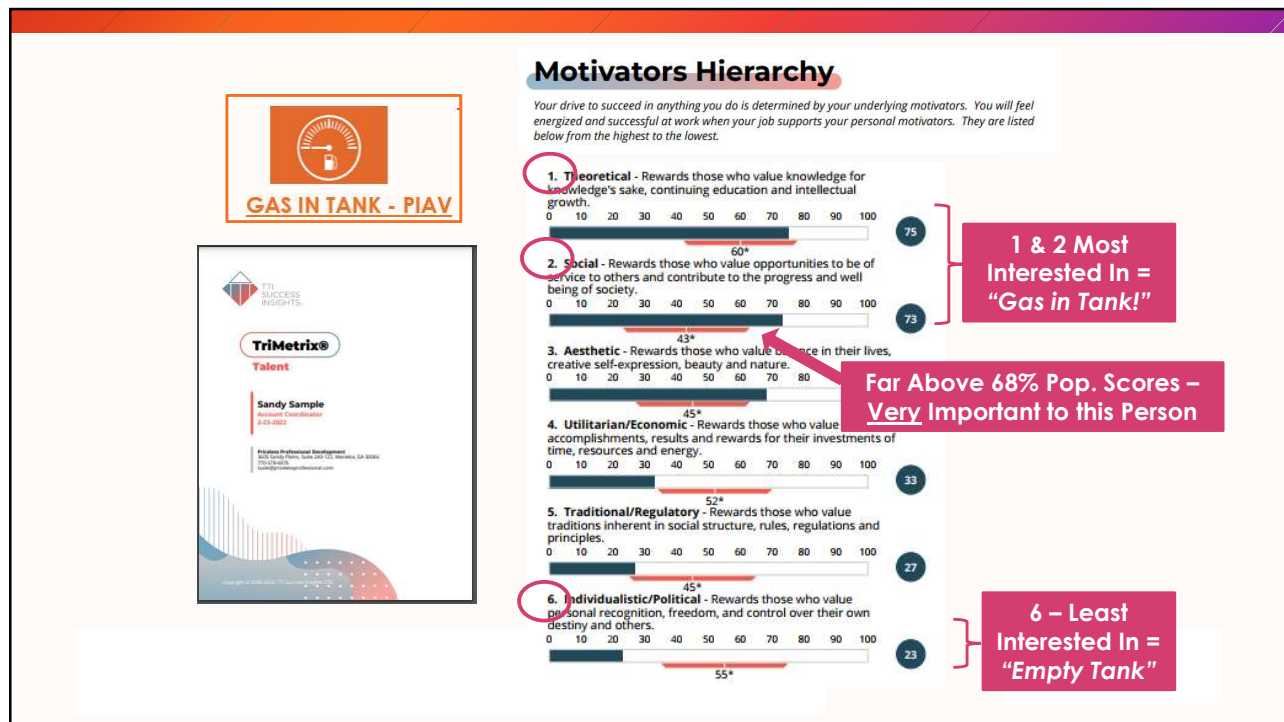


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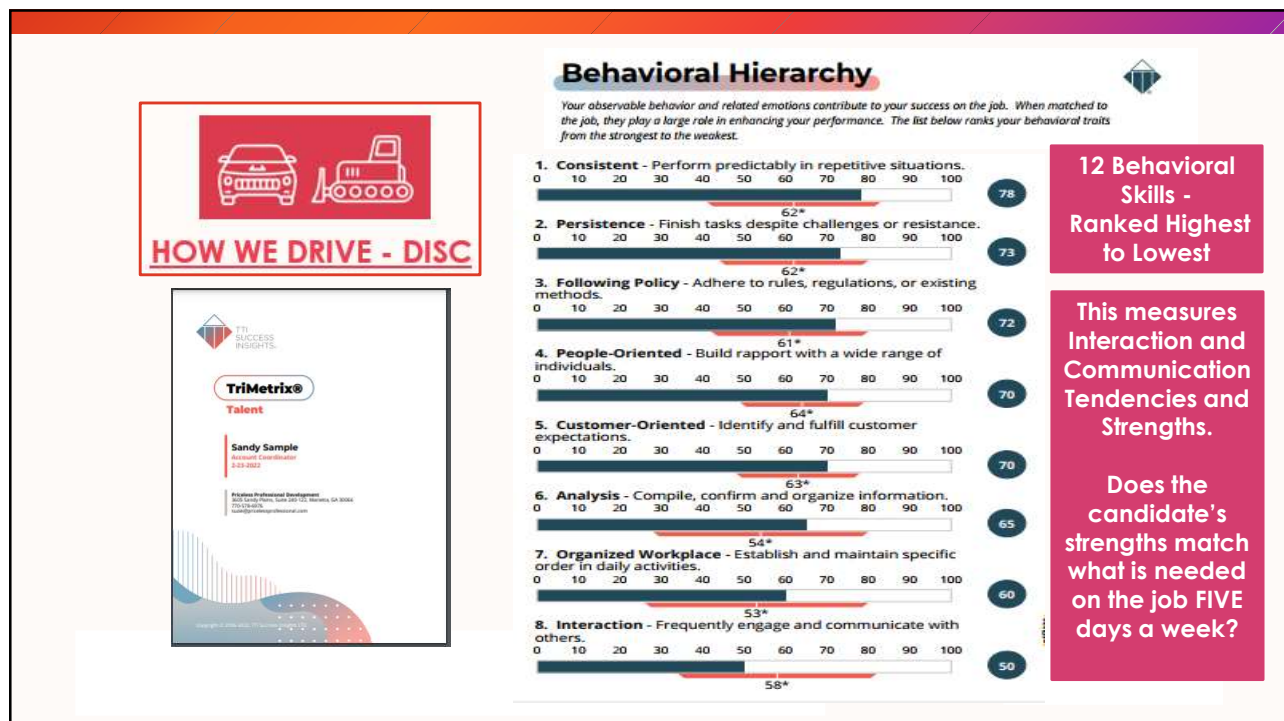


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**HOW WE DRIVE - DISC**




### Behavioral Feedback

Sandy wants to be liked by fellow workers, as well as be recognized for doing quality work. Coworkers know that her projects will always be done correctly. Rules and procedures provide security for her job performance. Sandy can devote all her energy to the job, and that offers security to her work situation. She can be sensitive about any comments regarding the quality of her work. She constantly strives forward to improvement in everything she does. Her motto for work may well be the coined phrase, "quality is job number one." Getting the project or job done right is important to her. If forced to choose between producing quality work or quantities of work, quality will be the winner. Sandy can be characterized by her creativity and attention to quality and detail. She wants the safety features on her equipment to be in good working order. She likes to work behind the scene and be seen as someone who is organized and has her life in order. Safety and security are important to her. Sandy prefers to work in an environment that is both economically and physically sound.

**Notes About the Candidate's Natural and Preferred Communication and Interaction Style...**

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## Hiring With TriMetrix in Four Steps:



- 1) Candidate Completes Assessment
- 2) Select Top TriMetrix Attributes for the POSITION
- 3) Compare Candidate to Top Job Attributes
- 4) Use TriMetrix Interview Questions. Consider Match and Next Steps.

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# Superior Performance Attributes Check List and Worksheet

**A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:**

**Step 1: Select the S.P.A. for the Position:** Select the **SUPERIOR PERFORMANCE ATTRIBUTES** important to success in the role by using the S.P.A. worksheet, attached.

The S.P.A. worksheet will help you think about the priorities for success in the position and then guide you to select:

- THE TOP 10 S.P.A.s for the position
- TOP 10 S.P.A.s for the position (behavioral)

**Step 2: R. & Review** the assessment results (from the attached Worksheet)

**MORE ABOUT RESULTS:** To check reliability – look at the Dimensional Source Page graph, the third graph on Page 1. Is the score, on the lower left corner 0.70 - 0.70 or higher?

- If yes, proceed, the report is reliable.
- If no, the candidate may need to complete a retake of the Personal Skills portion of the assessment. Contact your Human Resource Manager.

**MORE ABOUT MATCH AND MIS-MATCH:** Compare the Candidate's Results to the S.P.A. you selected as key for the job. Review how the Candidate scored, above or below population mean, on these pages in their report:

Personal Skills, (Candidate's Results - Pages 4 - 8)
Motivators, (Candidate's Results - Page 9)
Behaviors, (Candidate's Results - Pages 10 & 11)

If there are mis-matches and use the **TriMetrix Interview questions**, for each area, in your next interview. (Interview questions are in *alpha* order, and grouped by each science.)

**Finally, determine if you continue or stop the interview process.** Think about everything you currently know about this person: background, future goals, interview impressions, reference checks, assessment results and how closely this person matches the Superior Performance Attributes, to determine whether you continue or stop the interview process.

**STOP?** Candidate Notified on this date: \_\_\_\_\_

**CONTINUE** - Follow Up Potential Mis-Match Areas Are: \_\_\_\_\_

**TRIMETRIX – BASIC, DEBRIEFING PROCESS – WORKSHEET**

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the 10 Superior Performance Attributes (S.P.A.s) needed for success in the job.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Personal Skills – UNDER THE HOOD\*\* - PICK AND RANK ONE 7 RANKED JOB MASTER PLAN THE JOB:**

1. **Conceptual Thinking** - The ability to analyze hypothetical situations or abstract concepts to compile insight.
2. **Conflict Management** - Addressing and resolving conflict constructively.
3. **Continuous Learning** - Taking initiative in learning and implementing new concepts, technologies and/or methods.
4. **Creativity** - Adopting traditional or devising new approaches, concepts, methods, designs, processes, technologies and/or systems.
5. **Customer Focus** - A commitment to understanding and meeting customer needs.
6. **Decision Making** - Utilizing logic and data to make decisions.
7. **Diplomacy & Tact** - The ability to interact with others in a tactful and diplomatic manner.
8. **Empathy** - Identifying with and understanding the feelings of others.
9. **Employee Development/Coach** - The ability to help others develop their skills and knowledge.
10. **Flexibility** - Ability in adapting to change.
11. **Future Thinking** - Imagining and planning for the future.
12. **Goal Achievement** - The ability to set and achieve goals.
13. **Interpersonal Skills** - Effective communication and relationship building.
14. **Leadership** - Achieving extraordinary results through others.
15. **Negotiation** - Facilitating agreement and resolving conflict.
16. **Personal Accountability** - A commitment to taking responsibility for one's actions.
17. **Persuasion** - Convincing others to accept a point of view.
18. **Planning & Organizing** - Utilizing logical, systematic and orderly procedures to meet objectives.
19. **Presenting** - Communicating effectively to groups.
20. **Problem Solving Ability** - Anticipating, analyzing, diagnosing, and resolving problems.
21. **Resilience** - The ability to quickly recover from adversity.
22. **Self-Management** - Demonstrating self control and an ability to manage time and priorities.
23. **Teamwork** - Working effectively and productively with others.
24. **Understanding & Evaluating Others** - The capacity to perceive and understand the feelings and attitudes of others.
25. **Written Communication** - Writing clearly, succinctly and understandably.

**Workplace Motivators (Personal Attitudes, Values and Interests) - GAS IN TANK\*\* - PICK WHAT THE JOB MOST REWARDS - \$1, \$2, \$3 AND \$4 -**

1. **Utilitarian/Economic** - Rewards those who value practical accomplishments, results and rewards for their investments of time, resources and energy.
2. **Individualistic/Political** - Rewards those who value personal recognition, freedom, and control over their own destiny and others.
3. **Theoretical/Knowledge** - Rewards those who value knowledge for knowledge's sake, continuing education and intellectual growth.
4. **Traditional/Regulatory** - Rewards those who value traditions inherent in social structures, rules, regulations and principles.
5. **Social/Altruistic** - Rewards those who value opportunities to be of service to others and contribute to the progress and well-being of society.
6. **Aesthetic** - Rewards those who value beauty in their lives, creative self-expression, beauty and nature.

**Behavioral Traits: DRIVING STYLE\*\* - PICK THREE OF THE BEHAVIORS MOST NEEDED IN THE JOB THROUGHOUT THE DAY, EVERY DAY:**

1. **Analysis** - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low I)
2. **Customer Oriented** - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
3. **Competitive** - The job requires assertiveness and a "win or lose" in dealing with highly competitive situations. (DISC Graph: High D)
4. **Consistent** - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High I)
5. **Following Policy** - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
6. **Frequent Change** - The job requires rapid shifts between tasks. (DISC Graph: High Q, Over Low S)
7. **Interaction** - The job requires frequent communications and engagement with others. (DISC Graph: High I)
8. **Organized Workplace** - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low I)
9. **Persistence** - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
10. **People Oriented** - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
11. **Urgency** - The job requires decisiveness, quick response, and fast action. (DISC Graph: High D, Low S)
12. **Versatile** - The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)

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**This Non-Profit Leadership Benchmark was Created by the Board and Hiring Managers Discussing and Completing the S.P.A. Worksheet**

**Executive Leader Hiring Template/Benchmark**

**Top Priorities in the Role**

- #1 – Visionary leader who can facilitate change without authority.
- #2 – Member service focused.
- #3 – Manages operations and staff effectively.

**Top TriMetrix Superior Performance Attributes (S.P.A.) in the Role:**

**Personal Skills:** ('Under the Hood', 'Horsepower', Acumen)

1. Diplomacy & Tact
2. Conflict Management
3. Interpersonal Skills
4. Leading Others
5. Planning & Organization
6. Self-Management
7. Problem Solving
8. Customer Focus

**Top Motivators/Drivers:** ('Gas in the Tank', Drivers)


1. Social/Altruistic: A drive to be of service.
2. Utilitarian/Economic: A drive for practical results.
3. Individualistic/Political: A drive to lead and inspire others.

**Top Behaviors Five Days a Week:** ('How Job/Person Drive', Communication Style)

1. People Oriented
2. Interaction
3. Versatile

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## SPA Checklist



**A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:**

☐ **Step 1: Select the S.P.A. for the Position:** Select the **SUPERIOR PERFORMANCE ATTRIBUTES** important to success in the role by using the S.P.A. worksheet, attached.

The S.P.A. worksheet will help you think about the priorities for success in the position and then guide you to select:

- THE TOP SEVEN **Personal Skills** that must be mastered in the job
- TOP THREE **Rewards/Motivators** for the job and THE TOP THREE descriptors of **communication (behavioral style)** most needed on the job five days a week.

☐ **Step 2: R. & M. -** Check Assessment **RELIABILITY** of the Candidate's Assessment and Review S.P.A. Areas that **MATCH** or **MIS-MATCH** between the Job (from the attached Worksheet) and the Candidate's Assessment

**MORE ABOUT RELIABILITY:** \*To check Reliability - Look at the Dimensional Balance Page graph, the third graph on Page 1. Is the score, on the lower left corner 0.70 - 0.70 or higher?  
 - If yes, proceed, the report is reliable.  
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**MORE ABOUT MATCH AND MIS-MATCH:** Compare the Candidate's Results to the S.P.A. you selected as key for the job. Review how the Candidate scored, above or below population mean, on these pages in their report:

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Motivators. (Candidate's Results - Page 9)
Behaviors. (Candidate's Results - Pages 10 & 11)

If there are mis-matches and use the [TriMetrix Interview questions](#), for each area, in your next interview. (Interview questions are in alpha order, and grouped by each science.)


☐ Finally, determine if you continue or stop the interview process. Think about everything you currently know about this person: background, future goals, interview impressions, reference checks, assessment results and how closely this person matches the Superior Performance Attributes, to determine whether you continue or stop the interview process.

☐ **STOP?** Candidate Notified on this date: \_\_\_\_\_

☐ **CONTINUE** - Follow Up Potential Mis-Match Areas Are: \_\_\_\_\_

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## SPA Checklist



**A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:**

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# SPA Worksheet

**TRIMETRIX – BASIC, DEBRIEFING PROCESS – WORKSHEET:**

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job:

- Customer service support feedback is at X % positive.
- Demonstrates deep and rich knowledge of our products and adequately explain them to clients.
- Drives business through cross selling by X % annually.
- Transaction speed and accuracy is at X % on target.
- 

**Personal Skills – UNDER THE HOOD\*\*\*: PICK AND RANK TOP 2 NEEDED FOR MASTERY IN THE JOB:**

- Accountability for Others: The ability to take responsibility for others' actions.
- Conceptual Thinking: The ability to analyze hypothetical situations or abstract concepts to compile insight.
- Conflict Management: The ability to resolve different points of view constructively.
- Customer Focus: A commitment to customer satisfaction.
- Continuous Learning: The ability to take personal responsibility and action toward learning and implementing new ideas, methods and technologies.
- Decision Making: The ability to analyze all aspects of a situation to gain thorough insight to make decisions.
- Developing Others: The ability to contribute to the growth and development of others.
- Diplomacy and Tact: The ability to treat others fairly, regardless of personal biases or beliefs.
- Empathetic Outlook: The capacity to perceive and understand the feelings and attitudes of others.
- Flexibility: The ability to readily modify, respond to and integrate change with minimal personal resistance.
- Goal Achievement: The overall ability to set, pursue and attain achievable goals, regardless of obstacles or circumstances.
- Influencing Others: The ability to personally affect others' actions, decisions, opinions or thinking.
- Interpersonal Skills: The ability to interact with others in a positive manner.
- Leading Others: The ability to organize and motivate people to accomplish goals while creating a sense of order and direction.
- Objective Listening: The ability to listen to many points of view without bias.
- Personal Accountability: A measure of the capacity to be answerable for personal actions. \*\*\*
- Planning and Organization: The ability to establish a process for activities that lead to the implementation of systems, procedures or outcomes.
- Problem Solving: The ability to identify key components of a problem to formulate a solution or solutions.
- Resiliency: The ability to quickly recover from adversity.
- Results Orientation: The capacity to clearly and objectively understand and implement all variables necessary to obtain defined results.
- Self Management: The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames. \*\*\*
- Self-Starting Ability: The ability to initiate and sustain momentum without external stimulation.
- Teamwork: The ability to cooperate with others to meet objectives.

**Workplace Motivators (Personal Attitudes, Values and Interests): GAS IN TANK – PICK WHAT THE JOB MOST REWARDS - #1, #2 AND #3 –**

- Utilitarian/Economic - Rewards those who value practical accomplishments, results and rewards for their investments of time, resources and energy.
- Individualistic/Political - Rewards those who value personal recognition, freedom, and control over their own destiny and others.
- Theoretical/Knowledge - Rewards those who value knowledge for knowledge's sake, continuing education and intellectual growth.
- Traditional/Regulatory - Rewards those who value traditions inherent in social structure, rules, regulations and principles.
- Social/Altruistic - Rewards those who value opportunities to be of service to others and contribute to the progress and well-being of society.
- Aesthetic - Rewards those who value balance in their lives, creative self-expression, beauty and nature.

**Behavioral Trait Descriptors: HOW WE DRIVE – PICK THREE OF THE BEHAVIORS MOST NEEDED THROUGHOUT THE DAY, EVERY DAY:**

- Analysis - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low I)
- Customer Oriented - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
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- Consistent - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
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- People Oriented - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
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- Versatile - The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)



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# SPA Worksheet

**TRIMETRIX – BASIC, DEBRIEFING PROCESS – WORKSHEET:**

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job:

- 
- 
- 
- 
- 

**Personal Skills – UNDER THE HOOD\*\*\*: PICK AND RANK TOP 2 NEEDED FOR MASTERY IN THE JOB:**

- Accountability for Others: The ability to take responsibility for others' actions.
- Conceptual Thinking: The ability to analyze hypothetical situations or abstract concepts to compile insight.
- Conflict Management: The ability to resolve different points of view constructively.
- Customer Focus: A commitment to customer satisfaction.
- Continuous Learning: The ability to take personal responsibility and action toward learning and implementing new ideas, methods and technologies.
- Decision Making: The ability to analyze all aspects of a situation to gain thorough insight to make decisions.
- Developing Others: The ability to contribute to the growth and development of others.
- Diplomacy and Tact: The ability to treat others fairly, regardless of personal biases or beliefs.
- Empathetic Outlook: The capacity to perceive and understand the feelings and attitudes of others.
- Flexibility: The ability to readily modify, respond to and integrate change with minimal personal resistance.
- Goal Achievement: The overall ability to set, pursue and attain achievable goals, regardless of obstacles or circumstances.
- Influencing Others: The ability to personally affect others' actions, decisions, opinions or thinking.
- Interpersonal Skills: The ability to interact with others in a positive manner.
- Leading Others: The ability to organize and motivate people to accomplish goals while creating a sense of order and direction.
- Objective Listening: The ability to listen to many points of view without bias.
- Personal Accountability: A measure of the capacity to be answerable for personal actions. \*\*\*
- Planning and Organization: The ability to establish a process for activities that lead to the implementation of systems, procedures or outcomes.
- Problem Solving: The ability to identify key components of a problem to formulate a solution or solutions.
- Resiliency: The ability to quickly recover from adversity.
- Results Orientation: The capacity to clearly and objectively understand and implement all variables necessary to obtain defined results.
- Self Management: The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames. \*\*\*
- Self-Starting Ability: The ability to initiate and sustain momentum without external stimulation.
- Teamwork: The ability to cooperate with others to meet objectives.

**Workplace Motivators (Personal Attitudes, Values and Interests): GAS IN TANK – PICK WHAT THE JOB MOST REWARDS - #1, #2 AND #3 –**

- Utilitarian/Economic - Rewards those who value practical accomplishments, results and rewards for their investments of time, resources and energy.
- Individualistic/Political - Rewards those who value personal recognition, freedom, and control over their own destiny and others.
- Theoretical/Knowledge - Rewards those who value knowledge for knowledge's sake, continuing education and intellectual growth.
- Traditional/Regulatory - Rewards those who value traditions inherent in social structure, rules, regulations and principles.
- Social/Altruistic - Rewards those who value opportunities to be of service to others and contribute to the progress and well-being of society.
- Aesthetic - Rewards those who value balance in their lives, creative self-expression, beauty and nature.

**Behavioral Trait Descriptors: HOW WE DRIVE – PICK THREE OF THE BEHAVIORS MOST NEEDED THROUGHOUT THE DAY, EVERY DAY:**

- Analysis - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low I)
- Customer Oriented - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
- Competitive - The job requires assertiveness and a "will to win" in dealing with highly competitive situations. (DISC Graph: High D)
- Consistent - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
- Following Policy - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
- Frequent Change - The job requires rapid shifts between tasks. (DISC Graph: High D, Over Low S)
- Interaction - The job requires frequent communication and engagement with others. (DISC Graph: High I)
- Organized Workplace - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low I)
- Persistence - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
- People Oriented - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
- Urgency - The job requires decisiveness, quick response, and fast action. (DISC Graph: High D, Low S)
- Versatile - The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)

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## SPA Worksheet

### Human Resource Advisor

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job:

1. Responding to employee and manager questions timely manner.
2. Build relationships with leaders.
3. Effective recruiting, ability to execute.
4. Creative ways to engage employees.
5. Knowledge of all the processes and procedures.

1. ☐ **Analysis** - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low S)
2. ☐ **Customer Oriented** - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
3. ☐ **Competitive** - The job requires assertiveness and a "win to win" in dealing with highly competitive situations. (DISC Graph: High C)
4. ☐ **Consistent** - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
5. ☐ **Following Policy** - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
6. ☐ **Frequent Change** - The job requires rapid ability between tasks. (DISC Graph: High S, Over Low S)
7. ☐ **Interaction** - The job requires frequent communication and engagement with others. (DISC Graph: High I)
8. ☐ **Organized Workplace** - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low S)
9. ☐ **Persistence** - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
10. ☐ **People Oriented** - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, 1 Above S)
11. ☐ **Urgency** - The job requires decisiveness, quick response, and fast action. (DISC Graph: High S, Low S)
12. ☐ **Versatile** - The job requires adapting to various situations with ease. (DISC Graph: High I & S, Low S & C)

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1. Responding to employee and manager questions timely manner.
2. Build relationships with leaders.
3. Effective recruiting, ability to execute.
4. Creative ways to engage employees.
5. Knowledge of all the processes and procedures.

## SPA Worksheet

### Human Resource Advisor

**Personal Skill - UNDER THE HOOD\*\* PICK AND RANK TOP 7 NEEDED FOR MASTERY IN THE JOB:**

1. ☐ **Conceptual Thinking** - The ability to analyze hypothetical situations or abstract concepts to compile insight.
2. ☐ **Conflict Management** - Addressing and resolving conflict constructively.
3. ☐ **Continuous Learning** - Taking initiative in learning and implementing new concepts, technologies and/or methods
4. ☐ **Creativity** - Adapting traditional or devising new approaches, concepts, methods, models, designs, processes, technologies and/or systems.
5. ☐ **Customer Focus** - A commitment to customer satisfaction.
6. ☐ **Decision Making** - Utilizing effective processes to make decisions.
7. ☐ **Diplomacy & Tact** - The ability to treat others fairly, regardless of personal biases or beliefs.
8. ☐ **Empathy** - Identifying with and caring about others.
9. ☐ **Employee Development/Coaching** - Facilitating and supporting the professional growth of others
10. ☐ **Flexibility** - Agility in adapting to change.
11. ☐ **Futuristic Thinking** - Imagining, envisioning, projecting and/or predicting what has not yet been realized.
12. ☐ **Goal Achievement** - The ability to identify and prioritize activities that lead to a goal.
13. ☐ **Interpersonal Skills** - Effectively communicating, building rapport and relating well to all kinds of people.
14. ☐ **Leadership** - Achieving extraordinary business results through people.
15. ☐ **Negotiation** - Facilitating agreements between two or more parties.
16. ☐ **Personal Accountability** - A measure of the capacity to be answerable for personal actions.\*\*\*
17. ☐ **Persuasion** - Convincing others to change the way they think, believe or behave.
18. ☐ **Planning & Organizing** - Utilizing logical, systematic and orderly procedures to meet objectives.
19. ☐ **Presenting** - Communicating effectively to groups.
20. ☐ **Problem Solving Ability** - Anticipating, analyzing, diagnosing, and resolving problems.
21. ☐ **Resiliency** - The ability to quickly recover from adversity.
22. ☐ **Self-Management** - Demonstrating self control and an ability to manage time and priorities.\*\*\*
23. ☐ **Teamwork** - Working effectively and productively with others.
24. ☐ **Understanding & Evaluating Others** - The capacity to perceive and understand the feelings and attitudes of others.
25. ☐ **Written Communication** - Writing clearly, succinctly and understandably.



**HORSEPOWER - AXIOLOGY**

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## SPA Worksheet

### Human Resource Advisor

#### Workplace Motivators (Personal Attitudes, Values and Interests): GAS IN TANK – PICK WHAT THE JOB MOST REWARDS – #1, #2 AND #3 –

1. 1 Utilitarian/Economic - Rewards those who value practical accomplishments, results and rewards for their investments of time, resources and energy.
2. 1 Individualistic/Political - Rewards those who value personal recognition, freedom, and control over their own destiny and others.
3. 3 Theoretical/Knowledge - Rewards those who value knowledge for knowledge's sake, continuing education and intellectual growth.
4. 3 Traditional/Regulatory - Rewards those who value traditions inherent in social structure, rules, regulations and principles.
5. 2 Social/Altruistic - Rewards those who value opportunities to be of service to others and contribute to the progress and well-being of society.
6. 1 Aesthetic - Rewards those who value balance in their lives, creative self-expression, beauty and nature.

1. Responding to employee and manager questions timely manner.
2. Build relationships with leaders.
3. Effective recruiting, ability to execute.
4. Creative ways to engage employees.
5. Knowledge of all the processes and procedures.



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## SPA Worksheet

### Human Resource Advisor

#### Behavioral Trait Descriptors: HOW WE DRIVE – PICK THREE OF THE BEHAVIORS MOST NEEDED THROUGHOUT THE DAY, EVERY DAY:

1. 1 Analysis - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low I)
2. 1 Customer Oriented - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
3. 1 Competitive - The job requires assertiveness and a "will to win" in dealing with highly competitive situations. (DISC Graph: High D)
4. 3 Consistent - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
5. 4 Following Policy - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
6. 5 Frequent Change - The job requires rapid shifts between tasks. (DISC Graph: High D, Over Low S)
7. 1 Interaction - The job requires frequent communication and engagement with others. (DISC Graph: High I)
8. 1 Organized Workplace - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low I)
9. 1 Persistence - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
10. 1 People Oriented - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
11. 1 Urgency - The job requires decisiveness, quick response, and fast action. (DISC Graph: High D, Low S)
12. 2 Versatile - The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)

1. Responding to employee and manager questions timely manner.
2. Build relationships with leaders.
3. Effective recruiting, ability to execute.
4. Creative ways to engage employees.
5. Knowledge of all the processes and procedures.



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## SPA Worksheet

### TRIMETRIX – BASIC DEBRIEFING PROCESS – WORKSHEET:

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job:

1. ☐ Customer Service: The ability to interact with customers in a friendly and helpful manner.
2. ☐ Communication: The ability to communicate effectively with others.
3. ☐ Problem Solving: The ability to identify and solve problems.
4. ☐ Teamwork: The ability to work effectively with others.
5. ☐ Leadership: The ability to lead and motivate others.

**Personal Skills – UNDER THE HOOD™: PICK AND RANK TOP 7 NEEDED FOR SUCCESS IN THE JOB**

1. ☐ Accountability for Others: The ability to take responsibility for others' actions.
2. ☐ Conceptual Thinking: The ability to analyze hypothetical situations or abstract concepts to complete insight.
3. ☐ Conflict Management: The ability to resolve different points of view constructively.
4. ☐ Customer Focus: A commitment to customer satisfaction.
5. ☐ Continuous Learning: The ability to learn from experience and use that learning to improve performance.
6. ☐ Decision Making: The ability to analyze all aspects of a situation to gain thorough insight and make decisions.
7. ☐ Developing Others: The ability to coach and mentor others.
8. ☐ Diplomacy and Tact: The ability to interact with others in a tactful and diplomatic manner.
9. ☐ Empathy: The ability to understand and share the feelings of others.
10. ☐ Flexibility: The ability to readily modify, respond to and integrate change with minimal personal resistance.
11. ☐ Goal Setting: The ability to set and achieve goals.
12. ☐ Initiative: The ability to take action without being told.
13. ☐ Innovation: The ability to think of new and creative ways to do things.
14. ☐ Integrity: The ability to be honest and ethical.
15. ☐ Listening: The ability to listen to others and understand their needs.
16. ☐ Motivation: The ability to inspire and motivate others.
17. ☐ Networking: The ability to build and maintain a network of contacts.
18. ☐ Organization: The ability to organize and manage resources.
19. ☐ Persuasion: The ability to convince others of a particular point of view.
20. ☐ Project Management: The ability to plan, execute and complete projects.
21. ☐ Quality Control: The ability to ensure that work is done to a high standard.
22. ☐ Risk Management: The ability to identify and manage risks.
23. ☐ Time Management: The ability to manage time effectively.
24. ☐ Training: The ability to provide training to others.
25. ☐ Writing: The ability to write clearly and effectively.

## Insurance Sales

Think about the top three to five priorities in the job. List below. Keep these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job:

1. SALES: \$65K Revue to Org. by 12/31/2022
2. PROSPECTING: Holding x number of meetings weekly
3. PAPERWORK ADMIN: Completing required documentation on time and with accuracy.
4. KNOWLEDGE: Completing training and certifications as required in scheduled timeframe.
5.

### Behavioral Trait Descriptors: HOW WE DRIVE – PICK THREE OF THE BEHAVIORS MOST NEEDED THROUGHOUT THE DAY, EVERY DAY

1. ☐ Analysis: The job requires analyzing, confirming, and organizing information. (DISC Graph: High C, Low S)
2. ☐ Customer Oriented: The job requires identification and fulfillment of customer expectations. (DISC Graph: High I, Some S)
3. ☐ Competitive: The job requires competitiveness and a "win to win" in dealing with highly competitive situations. (DISC Graph: High C)
4. ☐ Consistent: The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
5. ☐ Following Policy: The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
6. ☐ Frequent Change: The job requires rapid shifts between tasks. (DISC Graph: High D, Over Low S)
7. ☐ Interaction: The job requires frequent communication and engagement with others. (DISC Graph: High I)
8. ☐ Organized Workplace: The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low S)
9. ☐ Persistence: The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
10. ☐ People Oriented: The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
11. ☐ Urgency: The job requires decisiveness, quick response, and fast action. (DISC Graph: High D, Low S)
12. ☐ Versatile: The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)

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## HUMAN RESOURCE ADVISOR Sample Position Benchmark by completing Step 1 of the S.P.A. Process:

### Human Resource Advisor Benchmark for ABC Company:

#### Top Priorities in Role

- #1 – Responding to employee and manager questions in a timely manner.
- #2 – Build relationships with leaders.
- #3 – Effective recruiting and the ability to execute.
- #4 – Creative ways to engage employees.
- #5 – Knowledge of all processes and procedures.

#### Top TriMetrix Superior Performance Attributes (S.P.A.) in the Role:

##### Personal Skills: ('Under the Hood', 'Horsepower', Acumen)

1. Interpersonal Skills
2. Customer Focus
3. Persuasion
4. Diplomacy and Tact
5. Employee Development and Coaching
6. Goal Achievement
7. Personal Accountability

##### Top Motivators/Drivers: ('Gas in the Tank', Drivers)

1. Individualistic/Political: A drive to lead and inspire others.
2. Social/Altruistic: A drive to serve, mentor, help, and coach others.
3. Traditional/Regulatory: A drive to follow and enforce rules, processes.

##### Top Behaviors Five Days a Week: ('How Job/Person Drive', Communication Style)

1. People Oriented (DISC Graph: High I & S, I above S)
2. Versatile (DISC Graph: High I & D, Low S & C)
3. Consistent (DISC Graph: High S)



HORSEPOWER – AXIOLOGY




GAS IN TANK – PIAY




HOW WE DRIVE – DISC

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SPA Worksheet	
Insurance Sales	
1. SALES: \$65K Revue to Org. by 12/31/2022 2. PROSPECTING: Holding x number of meetings weekly 3. PAPERWORK ADMIN: Completing required documentation on time and with accuracy. 4. KNOWLEDGE: Completing training and certifications as required in scheduled timeframe.	<p><b>Personal Skill - UNDER THE HOOD**:</b> PICK AND RANK TOP 7 NEEDED FOR MASTERY IN THE JOB:</p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> <b>Conceptual Thinking</b> - The ability to analyze hypothetical situations or abstract concepts to complete a task.</li> <li>2. <input type="checkbox"/> <b>Conflict Management</b> - Addressing and resolving conflict constructively.</li> <li>3. <input type="checkbox"/> <b>Continuous Learning</b> - Taking initiative in learning and implementing new concepts, technologies and/or methods.</li> <li>4. <input type="checkbox"/> <b>Creativity</b> - Adapting traditional or devising new approaches, concepts, methods, models, designs, processes, technologies and/or systems.</li> <li>5. <input type="checkbox"/> <b>Customer Focus</b> - A commitment to customer satisfaction.</li> <li>6. <input type="checkbox"/> <b>Decision Making</b> - Utilizing effective processes to make decisions.</li> <li>7. <input type="checkbox"/> <b>Diplomacy &amp; Tact</b> - The ability to treat others fairly, regardless of personal biases or beliefs.</li> <li>8. <input type="checkbox"/> <b>Empathy</b> - Identifying with and caring about others.</li> <li>9. <input type="checkbox"/> <b>Employee Development/Coaching</b> - Facilitating and supporting the professional growth of others.</li> <li>10. <input type="checkbox"/> <b>Flexibility</b> - Agility in adapting to change.</li> <li>11. <input type="checkbox"/> <b>Futuristic Thinking</b> - Imagining, envisioning, projecting and/or predicting what has not yet been realized.</li> <li>12. <input type="checkbox"/> <b>Goal Achievement</b> - The ability to identify and prioritize activities that lead to a goal.</li> <li>13. <input type="checkbox"/> <b>Interpersonal Skills</b> - Effectively communicating, building rapport and relating well to all kinds of people.</li> <li>14. <input type="checkbox"/> <b>Leadership</b> - Achieving extraordinary business results through people.</li> <li>15. <input type="checkbox"/> <b>Negotiation</b> - Facilitating agreements between two or more parties.</li> <li>16. <input type="checkbox"/> <b>Personal Accountability</b> - A measure of the capacity to be answerable for personal actions.***</li> <li>17. <input type="checkbox"/> <b>Persuasion</b> - Convincing others to change the way they think, believe or behave.</li> <li>18. <input type="checkbox"/> <b>Planning &amp; Organizing</b> - Utilizing logical, systematic and orderly procedures to meet objectives.</li> <li>19. <input type="checkbox"/> <b>Presenting</b> - Communicating effectively to groups.</li> <li>20. <input type="checkbox"/> <b>Problem Solving Ability</b> - Anticipating, analyzing, diagnosing, and resolving problems.</li> <li>21. <input type="checkbox"/> <b>Resiliency</b> - The ability to quickly recover from adversity.</li> <li>22. <input type="checkbox"/> <b>Self-Management</b> - Demonstrating self control and an ability to manage time and priorities.***</li> <li>23. <input type="checkbox"/> <b>Teamwork</b> - Working effectively and productively with others.</li> <li>24. <input type="checkbox"/> <b>Understanding &amp; Evaluating Others</b> - The capacity to perceive and understand the feelings and attitudes of others.</li> <li>25. <input type="checkbox"/> <b>Written Communication</b> - Writing clearly, succinctly and understandably.</li> </ol> <div style="text-align: right;">   <b>HORSEPOWER - AXIOLOGY</b> </div>

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SPA Worksheet	
Insurance Sales	
1. SALES: \$65K Revue to Org. by 12/31/2022 2. PROSPECTING: Holding x number of meetings weekly 3. PAPERWORK ADMIN: Completing required documentation on time and with accuracy. 4. KNOWLEDGE: Completing training and certifications as required in scheduled timeframe.	<p><b>Workplace Motivators (Personal Attitudes, Values and Interests): GAS IN TANK- PICK WHAT THE JOB MOST REWARDS - #1, #2 AND #3 -</b></p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> <b>Utilitarian/Economic</b> - Rewards those who value practical accomplishments, results and rewards for their investments of time, resources and energy.</li> <li>2. <input type="checkbox"/> <b>Individualistic/Political</b> - Rewards those who value personal recognition, freedom, and control over their own destiny and others.</li> <li>3. <input type="checkbox"/> <b>Theoretical/Knowledge</b> - Rewards those who value knowledge for knowledge's sake, continuing education and intellectual growth.</li> <li>4. <input type="checkbox"/> <b>Traditional/Regulatory</b> - Rewards those who value traditions inherent in social structure, rules, regulations and principles.</li> <li>5. <input type="checkbox"/> <b>Social/Altruistic</b> - Rewards those who value opportunities to be of service to others and contribute to the progress and well-being of society.</li> <li>6. <input type="checkbox"/> <b>Aesthetic</b> - Rewards those who value balance in their lives, creative self-expression, beauty and nature.</li> </ol> <div style="text-align: center;">   <b>GAS IN TANK - PIAV</b> </div>

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## SPA Worksheet

### Insurance Sales

#### Behavioral Trait Descriptors: HOW WE DRIVE - PICK THREE OF THE BEHAVIORS MOST NEEDED THROUGHOUT THE DAY, EVERY DAY:

1. ☐ Analysis - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low I)
2. ☐ Customer Oriented - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
3. ☒ Competitive - The job requires assertiveness and a "will to win" in dealing with highly competitive situations. (DISC Graph: High D)
4. ☐ Consistent - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High S)
5. ☐ Following Policy - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High C)
6. ☐ Frequent Change - The job requires rapid shifts between tasks. (DISC Graph: High D, Over Low S)
7. ☐ Interaction - The job requires frequent communication and engagement with others. (DISC Graph: High I)
8. ☐ Organized Workplace - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low I)
9. ☐ Persistence - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High S)
10. ☐ People Oriented - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
11. ☒ Urgency - The job requires decisiveness, quick response, and fast action. (DISC Graph: High D, Low S)
12. ☒ Versatile - The job requires adapting to various situations with ease. (DISC Graph: High I & D, Low S & C)

1. SALES: \$65K Revenue to Org. by 12/31/2022
2. PROSPECTING: Holding x number of meetings weekly
3. PAPERWORK ADMIN: Completing required documentation on time and with accuracy.
4. KNOWLEDGE: Completing training and certifications as required in scheduled timeframe.



HOW WE DRIVE - DISC

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## INSURANCE SALES Sample Position Benchmark by completing Step 1 of the S.P.A. Process:

#### Insurance Sales Benchmark for ABC Company:

##### Top Priorities in Role

- #1 – SALES: \$65K Revenue to Org. by 12/31/22
- #2 – PROSPECTING: Holding X number of meeting weekly
- #3 – PAPERWORK ADMIN: Completing required documentation on time and with accuracy
- #4 – KNOWLEDGE: Completing training and certification as required in scheduled time frame

##### Top Metrics Superior Performance Attributes (S.P.A.) in the Role:

Personal Skills: ('Under the Hood', 'Horsepower', 'Acumen')

1. Goal Achievement
2. Personal Accountability
3. Persuasion
4. Resiliency
5. Self-Management
6. Customer Focus
7. Interpersonal Skills

##### Top Motivators/Drivers: ('Gas in the Tank', 'Drivers')

1. Utilitarian/Economic: A drive for practical results.
2. Individualistic/Political: A drive to lead and inspire others.
3. Theoretical/Knowledge: A drive for knowledge and product expertise.

##### Top Behaviors Five Days a Week: ('How Job/Person Drive', 'Communication Style')

1. Competitive (DISC Graph: High D)
2. Urgency (DISC Graph: High D, Low S)
3. Versatile (DISC Graph: High I & D, Low S & C)



HORSEPOWER - AXIOLOGY



GAS IN TANK - PIAY



HOW WE DRIVE - DISC

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# Superior Performance Attributes Check List and Worksheet

**priceless**  
PROFESSIONAL DEVELOPMENT

**A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:**

☐ **Step 1: Select the S.P.A. for the Position:** Select the SUPERIOR PERFORMANCE ATTRIBUTES important to success in the role by using the S.P.A. worksheet, attached.

The S.P.A. worksheet will help you to select:

- THE TOP SEVEN Personal Skills that must be mastered in the job
- THE TOP THREE Rewards/Motivators for the job and THE TOP THREE descriptors of communication (behavioral style) most needed on the job five days a week.

☐ **Step 2: R. & M.:** Check Assessment RELIABILITY\* of the Candidate's Assessment and Review S.P.A. Areas that MATCH or MIS-MATCH between the Job (from the attached Worksheet) and the Candidate's Assessment

**MORE ABOUT RELIABILITY:** \*To check Reliability - Look at the Dimensional Balance Page graph, the third graph on Page 3. Is the score, on the lower left corner 0.70 - 0.70 or higher?

- If yes, proceed, the report is reliable.

- If no, the candidate may need to complete a retake of the Personal Skills portion of the assessment. Contact your Human Resource Manager.

**MORE ABOUT MATCH AND MIS-MATCH:** Compare the Candidate's Results to the S.P.A. you selected as key for the job. Review how the Candidate scored, above or below population mean, on these pages in their report:

Personal Skills (Candidate's Results - Pages 4 - 8)
Motivators (Candidate's Results - Page 9)
Behaviors (Candidate's Results - Pages 10 & 11)

If there are mis-matches and use the TriMetrix interview questions, for each area, in your next interview. (Interview questions are in alpha order, and grouped by each science.)

☐ **Finally, determine if you continue or stop the interview process.** Think about everything you currently know about this person: background, future goals, interview impressions, reference checks, assessment results and how closely this person matches the Superior Performance Attributes, to determine whether you continue or stop the interview process.

☐ **STOP:** Candidate Notified on this date: \_\_\_\_\_

☐ **CONTINUE** - Follow Up Potential Mis-Match Areas Are: \_\_\_\_\_

**TRIMETRIX – BASIC, DEBRIEFING PROCESS – WORKSHEET**

Think about the top three key priorities for the job. List below. How these priorities in mind as you select the TriMetrix Superior Performance Attributes (S.P.A.) needed for success on the job.

1	
2	
3	
4	
5	

**Personal Skills - UNDER THE HOOD\*\* - PICK AND RANK THE 7 REWARDS FOR SUCCESS ON THE JOB**

1	
2	
3	
4	
5	
6	
7	

**Behavioral Traits: DRIVING STYLE\*\* - PICK THREE OF THE BEHAVIORS MOST NEEDED IN THE JOB THROUGHOUT THE DAY, EVERY DAY**

1	Analysis - The job requires compiling, confirming, and organizing information. (DISC Graph: High C, Low S)
2	Customer Oriented - The job requires identification and fulfillment of customer expectations. (DISC Graph: High S, Some I)
3	Competitive - The job requires competitiveness and a "will to win" in dealing with highly competitive situations. (DISC Graph: High D)
4	Consistent - The job requires the ability to do the job the same way on a repeated basis. (DISC Graph: High I)
5	Following Policy - The job requires adhering to rules, regulations or existing methods. (DISC Graph: High O)
6	Frequent Change - The job requires rapid shifts between tasks. (DISC Graph: High O, Over Low I)
7	Interaction - The job requires frequent communication and engagement with others. (DISC Graph: High I)
8	Organized Workplace - The job requires establishing and maintaining specific order in daily activities. (DISC Graph: High C, Low I)
9	Persistence - The job requires finishing tasks despite challenges or resistance. (DISC Graph: High C, Over High I)
10	People Oriented - The job requires building rapport with a wide range of individuals. (DISC Graph: High I & S, I Above S)
11	Urgency - The job requires decisiveness, quick response, and fast action. (DISC Graph: High O, Low I)
12	Versatile - The job requires adapting to various situations with ease. (DISC Graph: High I & O, Low S & C)

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**SPA  
Checklist**

**priceless**  
PROFESSIONAL DEVELOPMENT

**A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:**

☒ **Step 1: Select the S.P.A. for the Position:** Select the SUPERIOR PERFORMANCE ATTRIBUTES important to success in the role by using the S.P.A. worksheet, attached.

The S.P.A. worksheet will help you think about the priorities for success in the position and then guide you to select:

- THE TOP SEVEN Personal Skills that must be mastered in the job
- THE TOP THREE Rewards/Motivators for the job and THE TOP THREE descriptors of communication (behavioral style) most needed on the job five days a week.

☐ **Step 2: R. & M.:** Check Assessment RELIABILITY\* of the Candidate's Assessment and Review S.P.A. Areas that MATCH or MIS-MATCH between the Job (from the attached Worksheet) and the Candidate's Assessment

**MORE ABOUT RELIABILITY:** \*To check Reliability - Look at the Dimensional Balance Page graph, the third graph on Page 3. Is the score, on the lower left corner 0.70 - 0.70 or higher?

- If yes, proceed, the report is reliable.

- If no, the candidate may need to complete a retake of the Personal Skills portion of the assessment. Contact your Human Resource Manager.

**MORE ABOUT MATCH AND MIS-MATCH:** Compare the Candidate's Results to the S.P.A. you selected as key for the job. Review how the Candidate scored, above or below population mean, on these pages in their report:

Personal Skills (Candidate's Results - Pages 4 - 8)
Motivators (Candidate's Results - Page 9)
Behaviors (Candidate's Results - Pages 10 & 11)

If there are mis-matches and use the TriMetrix interview questions, for each area, in your next interview. (Interview questions are in alpha order, and grouped by each science.)

☐ **Finally, determine if you continue or stop the interview process.** Think about everything you currently know about this person: background, future goals, interview impressions, reference checks, assessment results and how closely this person matches the Superior Performance Attributes, to determine whether you continue or stop the interview process.

☐ **STOP:** Candidate Notified on this date: \_\_\_\_\_

☐ **CONTINUE** - Follow Up Potential Mis-Match Areas Are: \_\_\_\_\_

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**priceless**  
PROFESSIONAL DEVELOPMENT

A Checklist for Debriefing a TriMetrix Talent Report – The BASIC Process:

☐ **Step 1:** Select the S.P.A. for the Position: Select the SUPERIOR PERFORMANCE ATTRIBUTES important to success in the role by using the S.P.A. worksheet.

☐ **Step 2: R. & M.** - Check Assessment **RELIABILITY** and Review Areas that **MATCH or MIS-MATCH** the Superior Performance Attributes important for success on the job.

**To check Reliability** - Look at the **Dimensional Balance** Page graph, the third graph on Page 1. Is the score, on the lower left corner **0.70 - 0.70 or higher?**

- If yes, proceed, the report is **reliable**.
- If no, the candidate may need to complete a retake of the Personal Skills portion of the assessment. Contact your Human Resource Manager.

as key for the job. Review how the Candidate scored, above or below population mean, on these pages in their report:

Personal Skills. (Candidate's Results - Pages 4 - 8)
Motivators. (Candidate's Results - Page 9)
Behaviors. (Candidate's Results - Pages 10 & 11)

If there are mis-matches and use the **TriMetrix Interview questions**, for each area, in your next interview. (Interview questions are in alpha order, and grouped by each science.)

☐ Finally, determine if you continue or stop the interview process. Think about everything you currently know about this person: background, future goals, interview impression, reference checks, assessment results and how closely this person matches the Superior Performance Attributes, to determine whether you continue or stop the interview process.

☐ **STOP?** Candidate Notified on this date: \_\_\_\_\_

☐ **CONTINUE** - Follow Up Potential Mis-Match Areas Are: \_\_\_\_\_

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If NOT reliable check with PPD to get a retake link.

	Empathetic Outlook	Practical Thinking	Systems Judgment	Sense of Self	Role Awareness	Self Direction
Clarity	86	84	82	78	66	84
Bias	✱	↓	↑	↓	↑	↓
Blind Spot	14	16	18	22	34	16

Rev: 0.94-0.87

Must Be: .70 - .70 or higher...

This graph is on the last page, page 17.

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## Hiring With TriMetrix in Four Steps:



1) Candidate Completes Assessment

2) Select Top TriMetrix Attributes for the POSITION

3) Compare Candidate to Top Job Attributes and Five Areas of Fit

4) Use TriMetrix Interview Questions. Consider Match and Next Steps.

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## Five Areas That Impact Performance:



ROADS TRAVELED/FUTURE PLANS

**Background, Experience/  
Knowledge & Future Goals**



HOW WE DRIVE - DISC

**Communication  
& Interaction Style**



GAS IN TANK - PIAV  
**Motivation, Values and  
Interest in the Work**



HORSEPOWER – AXIOLOGY

**Personal Skills &  
Acumen**










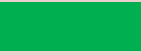





GARAGE/WHERE PARKED

**Culture & Team**

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## Attributes Worksheet: Comparing Two Insurance Sales Candidates

Five Areas of FIT	Candidate A - Sally	Candidate B - Jane
 <b>Roads Traveled Future Travel Plans</b>		
 <b>Gas In Tank – Motivators</b>		
 <b>How Drive – DISC</b>		
 <b>Under the Hood – Personal Skills</b>		
 <b>Garage/Where Parked Culture &amp; Team and Overall Fit.</b>	<b>FIT Questions:</b> Did not match three attributes.	<b>FIT Questions:</b> Review Interview Team Feedback










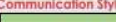



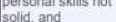
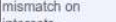
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### TriMetrix Notes Debrief Worksheet - SAMPLE


SAMPLE Candidate Compared to Account Manager Benchmark:

Candidate's Name: Conner the Candidate Position: Account Manager  
Reviewer's Name: Suzie Price Date: 3-2-2022


**Match Color Code Key:**  
 Very Strong Match, > 68% Pop. Mean    Good Match, > 48% Pop. Mean    Fair Match, < 48% Pop. Mean    Poor Match, < 33% Pop. Mean  
 Match is the candidate's score compared to 68% of the population's score, the red bar in each Hierarchy list.

Account Manager SPAs:	Conner the Candidate's Match to SPAs	Reviewer Notes:
<b>Personal Skills – 'Under the Hood', 'Horsepower', Acumen</b>		
Diplomacy and Tact		<b>Personal Skills Notes:</b> Fair to low score on the top 3 skills. Follow up here in next interview
Conflict Management		
Interpersonal Skills		
Leading Others		
Planning & Organization		
Self-Management		
Problem Solving		<b>Motivator Notes:</b> Motivator mismatch. Her #6 - least interest - is not following protocols, will that be an issue?
Customer Focus		
		
<b>Top Motivators – 'Gas in the Tank', Drivers</b>		
Social/Altruistic		<b>Behavior Style Notes:</b> Solid DISC style match
Utilitarian/Economic		
Individualistic/Political		
<b>Top Behaviors – 'How Job/Person Drive', Communication Style</b>		
People-Oriented		<b>Behavior Style Notes:</b> Solid DISC style match
Interaction		
Versatile		
<b>LEVEL OF RISK, BASED ON ASSESSMENT ONLY**</b> 5= Greatest Level of Match, Less Risk 3= Not a Match in Some Areas, Fair Amount of Risk 1= Not a Match in Many Areas, Highest Level of Risk Risk is: 350. Due to key personal skills not solid, and mismatch on interests. ? on attitude bias.		


\*\*Assessment results are <30% of any management decision.



**HORSEPOWER – AXIOLOGY**



**GAS IN TANK - PIAV**



**HOW WE DRIVE - DISC**

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### TriMetrix Notes Debrief Worksheet - SAMPLE

**SAMPLE Candidate Compared to Account Manager Benchmark:**

Candidate's Name: Conner the Candidate      Position: Account Manager  
 Reviewer's Name: Suzie Price      Date: 3-2-2022

Match Color Code Key:		
Very Strong Match	Good Match >Pop. Mean	Fair Match, < Pop. Mean
Match is the candidate's score compared to 68% of the population's score, the red bar in each Hierarchy list.		
Account Manager SPAs:	Conner the Candidate's Match to SPAs	Reviewer Notes:
Personal Skills - "Under the Hood", "Horsepower", Acumen		
Diplomacy and Tact		Personal Skills Notes:

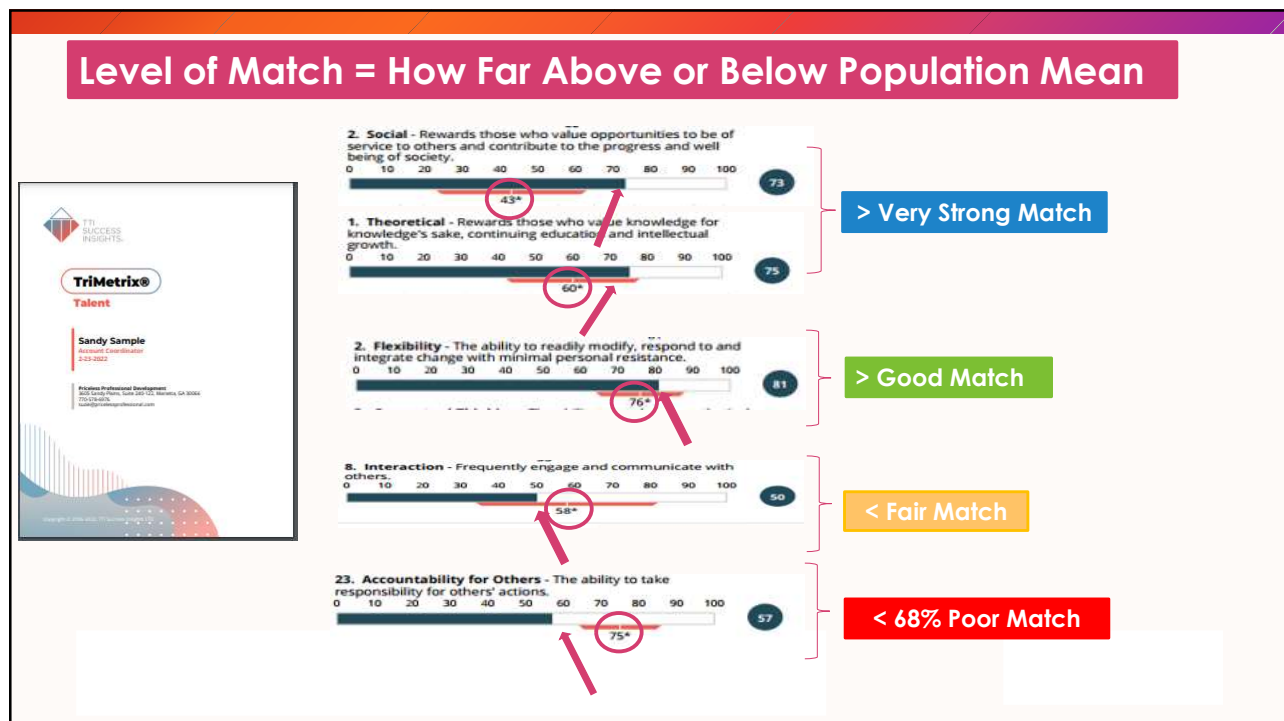
**Match Color Code Key:**

Very Strong Match
Good Match >Pop. Mean
Fair Match, < Pop. Mean
Poor Match, < 68% Pop.

Match is the candidate's score compared to 68% of the population's score, the red bar in each Hierarchy list.

Self-Management		
Problem Solving		
Customer Focus		
Top Motivators - "Gas in the Tank", Drivers		
Social/Altruistic		Motivator Notes:
Utilitarian/Economic		Motivator mismatch. Her #6 - least interest - is not following protocols, will that be an issue?
Individualistic/Political		
Top Behaviors - "How Job/Person Drive", Communication Style		
People-Oriented		Behavior Style Notes:
Interaction		Solid DISC style match
Versatile		
LEVEL OF RISK, BASED ON ASSESSMENT ONLY**	Risk is: 350. Due to key personal skills not solid, and mismatch on interests.	Schedule a follow up interview - use TriMetrix interview questions. Ask references about her ability to build rapport with others and on being of service to others.
**Assessment results are <30% of any management decision.		

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## Hiring With TriMetrix in Four Steps:



1) Candidate Completes Assessment

2) Select Top TriMetrix Attributes for the POSITION

3) Compare Candidate to Top Job Attributes and Five Areas of Fit

4) Use TriMetrix Interview Questions. Consider Match and Next Steps.

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## Sample Follow Up Interview Questions Candidate:



**Under The Hood : Customer Focus** (A commitment to customer satisfaction.)

Give me an example of a time when you knew the customer was wrong, but you had to accommodate their wishes. How did you handle it? What did you say? What did you do? How did you feel about it?

Tell me about a situation where you were able to anticipate a customer's needs before the customer even mentioned what they wanted.



**Under The Hood : Planning and Organization** (Ability to implement processes and procedures.)

Have you ever faced a day in which you just couldn't get everything done that you had planned? How did you handle it?

Do you consider yourself to be a good time manager? Share with me the planning system you use and show me how you use it.



**Gas In Tank: Traditional/Regulatory** (A drive interest in following processes, rules and procedures.)

Is there an absolute right and absolute wrong? How do you decide what is right and what is wrong?

Do you sometimes feel that things would be easier and better if there were fewer rules and procedures? How do you deal with it?

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## Hiring Manager Debrief Thought and Conversation Process:

### HIRING MANAGER:

- What do you like about this candidate?
- What concerns do you have?

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## Hiring Manager Debrief Thought Process:

### HIRING MANAGER:

- What do you like about this candidate?
- What concerns do you have?

### REVIEW:

- The Position Benchmark – The Top Job Priorities and Superior Performance Attributes selected for the role.
- Candidate matches and potential gaps.
- Potential level of risk, based upon fit.

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## Hiring Manager Debrief Conversation Process:

### HIRING MANAGER:

- What do you like about this candidate?
- What concerns do you have?

### REVIEW:

- The Position Benchmark – The Top Job Priorities and Superior Performance Attributes selected for the role.
- Candidate matches and potential gaps.
- Potential level of risk, based upon fit.

### PROVIDE:

- Sample interview questions for gap areas if a 2<sup>nd</sup> interview will be held.

***"The TriMetrix interview questions are so beneficial – they help me be a better business partner."***  
Feedback from a Human Resource Leader

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## How to Conduct Revealing Reference Checks:

### Overcome useless reference checks. Get the information you need.

**Conducting Revealing Reference Checks**  
Overcome useless reference checks. Get the information you need.

I discovered a creative and effective reference checking process from Bradford Smart's excellent hiring and performance manual: **Topgrading**, 3rd Edition: The Hiring and Promoting Method That Turbocharges Company Performance.

I've shared the steps from my book below. They can help you in the selection process, especially when you have unanswered concerns around a candidate or if you are filling a key, high-impact position within the company.

**FIRST:**

- Get Written Permission. Secure written permission from the candidate to contact references for as long as ten years. Be ready to send this to each reference. I asked for it.
- Ask your candidate to reach out, in advance of your call, to each of his/her past managers to expect a call from you.
- If the candidate cannot share, contact information from his/her managers is contingent upon no negative surprises.

**NEXT:**

- Contact each reference:
  - Call during an off-hour. People will tend to be more relaxed and open early in the morning, late in the day, or on the weekend.
  - Promise total confidentiality.
  - Take notes.
  - Create the tone of a trusted colleague and let the candidate know the applicant will who is apt to better manage the applicant if (the reference) will be kind enough to share some insights.
  - If you are getting a "whitewash" inquire about negatives specifically. (Use the areas of concern uncovered in the assessment and during the interview.)

**REFERENCE CALL – SCRIPT AND QUESTIONS:** Just follow the script, you will be amazed at how well it works! Be ready to take notes and to press for specifics.

"Hello \_\_\_\_name of reference\_\_\_\_. Thank you very much for accepting my call. As \_\_\_\_candidate's name\_\_\_\_ indicated we are considering hiring her/him for the position of \_\_\_\_title of position\_\_\_\_. I would very much appreciate your comments on her/his strengths and areas for improvement. I would also appreciate your wisdom and insight into how we might best manage her/him. Anything you share will be held in the strictest confidence."

1. What would you consider are \_\_\_\_candidate's name\_\_\_\_ strengths, assets, things you like and respect?
2. What are \_\_\_\_candidate's name\_\_\_\_ shortcomings, weak points, and areas of improvement?
3. Would you please clarify what \_\_\_\_candidate's name\_\_\_\_ responsibilities were in the past? (Use the scale below to rate his/her performance. 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent)
4. On a scale of 1 to 4, how would you rate his/her overall performance? Why did you give him/her that rating?
5. In a few details, what were \_\_\_\_candidate's name\_\_\_\_ starting and final employment levels?
6. How would you rate his/her performance on the job? (Use the scale below to rate his/her performance. 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent)
7. Let me tell you more about the job \_\_\_\_candidate's name\_\_\_\_ is applying for. \_\_\_\_title of position\_\_\_\_. How do you think \_\_\_\_candidate's name\_\_\_\_ might fit in the job? Good fit? Not a good fit? (Use the scale below to rate his/her performance. 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent)
8. Would you please rate \_\_\_\_candidate's name\_\_\_\_ on these categories: excellent, good, fair, and poor. (Use the scale below to rate his/her performance. 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent)
9. What would be your best advice to me on how I could best manage \_\_\_\_candidate's name\_\_\_\_? Do you have any final comments or suggestions about \_\_\_\_candidate's name\_\_\_\_? (Use the scale below to rate his/her performance. 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent)

"Thank you so much for your time and insight. Your insights are very helpful and useful. I would very much appreciate your comments on her/his strengths and areas for improvement. I would also appreciate your wisdom and insight into how we might best manage her/him. Anything you share will be held in the strictest confidence."

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## TriMetrix Hiring - Reference Document

**Wake Up Eager Hiring**  
Hiring with **TriMetrix** - Step-by-Step Process and Resources

The **TriMetrix** Hiring document will make it easy for any manager to understand how to put people in the right seats quickly. This process is designed to help you match what the job needs for success to candidate strengths, helping you determine the level of job fit.

In employee engagement research, when an employee can say that they "got to do what they do best" every day - they are six times more likely to be engaged and committed to the work. And if a twenty-person team can say this same, they have six times higher customer service scores and 35% higher productivity scores.

**Reference Notes**

- The **TriMetrix** PWA is the person with the assessment.
- The Hiring Manager who makes the best use of the assessment in hiring decisions are those who have applied these processes to themselves and their team. (Take the **TriMetrix** assessment and use this process on yourself)
- Use **TriMetrix** Researcher and apply the **TriMetrix** Job Fit with the **TriMetrix** Assessment.
- Assessment results should be considered 40% of any management decision.
- Candidate Suite with questions or suggestions, [ask for internal review of job](#).

**STEP 1: SEND ASSESSMENT INSTRUCTIONS AND LINK EMAIL**

Send the Candidate (Internal or External) the following **sample email assessment instructions**. Contact Suite for the correct assessment link.

**Hi CANDIDATE NAME:**

Thank you for interviewing with **COMPANY NAME**. As a part of our Candidate Process, you are asked to complete online assessments. Please read these instructions carefully.

1. Complete these assessments when you are in your **normal** state of mind.
2. Approach the assessments with an open mind and do what each assessment asks of you.
3. Complete these instructions in one sitting with no interruptions. (Allow 30 minutes)
4. If possible, use your computer or a larger mobile device, not your phone.
5. \*\*\*These assessments should be taken in your native language for the best results. When you start, if your native language is not English, go to the top RIGHT-HAND CORNER for a LANGUAGE dropdown box and select YOUR NATIVE LANGUAGE.

To access and complete your assessment - go to [ASSESSMENT LINK](#).

Please reach out to **COMPANY CONTACT INFO HERE** if you have any questions.

Wake Up Eager Hiring with **TriMetrix** 3/2022  
770-843-2667

**STEP 2: SELECT THE SUPERIOR PERFORMANCE ATTRIBUTES FOR THE JOB & CREATE A POSITION BENCHMARK**

Work with the **TriMetrix** Manager™ to create a Position Benchmark, using the Superior Performance Attributes Worksheet. Get HUS International's Benchmark [Worksheet and Assessment Link](#).

**PWA stands for Person with the Assessment.**  
If the Manager is not available, use the worksheet and use your knowledge to create a Position Benchmark for hiring purposes.

**STEP 3: COMPARE PWA'S ASSESSMENT TO THE POSITION BENCHMARK - ASSESS STRENGTHS AND POTENTIAL GAPS**

Once the top attributes for success in the role have been selected, compare the PWA's assessment results to the benchmark. Assess strengths, gaps, strengths, and strengths compared to the position. [Use the position matrix worksheet](#).

**STEP 4: HIRING MANAGER DEBRIEF CONVERSATION PROCESS\*\***

\*\* Watch the [Superior Performance Attributes](#) overview on the process.

**ASK HIRING MANAGER**

- What do you like about this candidate?
- What concerns do you have?

**DEBRIEF**

The Position Benchmark - The Top Job Priorities and Superior Performance Attributes selected for the role.

- Discuss candidate matches and potential gaps and potential level of risk based upon fit.

**PROVIDE**

- [TriMetrix](#) [Interview Questions](#) for gap areas if a 2nd interview will be held.

**CLICK, DETAILED SUPPORT GRAPH READING REFERENCE CARDS FOR ADVANCED TRI-METRIX LINKS.** [Interviewing the Discretionary Beliefs, Skills, Values, and Attitudes](#) [Interviewing the Discretionary Beliefs, Skills, Values, and Attitudes](#) [Interviewing the Discretionary Beliefs, Skills, Values, and Attitudes](#)

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Page 1 of 2

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## TriMetrix Hiring Reference Document

**"This is SO helpful – this document contains all the information you need with direct links to resources – a huge timesaver. Thank you!!!"**

**Client Leader Feedback**

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## Hiring Manager Tools:



**Book**



**eBook**



**Podcast**

Superior Performance Attributes Check List and Worksheet, Interview questions for each TriMetrix Area, and more...  
[suzie@pricelessprofessional.com](mailto:suzie@pricelessprofessional.com)

Top 13 Interview Mistakes Quiz:  
[www.pricelessprofessional.com/13mistakes](http://www.pricelessprofessional.com/13mistakes)

The Three Biggest Mistakes Interviewers Make (Short eBook)  
 How to Hire Superior Performers: 70 Best Practices (PDF Book with Optional Email Training Program) [suzie@pricelessprofessional.com](mailto:suzie@pricelessprofessional.com)

Podcast: [www.WakeUpEagerWorkforce.com](http://www.WakeUpEagerWorkforce.com)



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## You Must Know:

*“Are they going to be **happy**?  
 Are they going to be **productive**?  
 Will they want to **stay**?  
 Will they **own their job**?  
 Will they **contribute their talent generously**?”*

Dr. Robert S. Hartman  
 Founder of the Science of Axiology

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## Five Areas That Impact Performance:



### ROADS TRAVELED/FUTURE PLANS

**Background, Experience/  
Knowledge & Future Goals**



### HOW WE DRIVE - DISC

**Communication  
& Interaction Style**



### GAS IN TANK - PIAV

**Motivation, Values and  
Interest in the Work**



### HORSEPOWER – AXIOLOGY

**Personal Skills &  
Acumen**




### GARAGE/WHERE PARKED

**Culture & Team**


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PROFESSIONAL DEVELOPMENT



**WAKE  
UP** WITH  
**EAGER**  
SUZIE PRICE

priceless | WUE

**Hiring  
with  
TriMetrix**



**SUZIE PRICE** | Priceless Professional Development | 770-842-2669  
suzie@pricelessprofessional.com | Certifications: CPF, CPDA, CPMA, TMEA, CAP

Helping you create a  
**Wake Up Eager** life.  
[www.pricelessprofessional.com](http://www.pricelessprofessional.com)