



HUB International TriMetrix Learning Bite – Video 2

[00:00:02] Hi there, welcome to Hiring with TriMetrix. This is Video 2 of 3. These are learning byte development programs using TriMetrix specifically for HUB International. My name is Suzie Price and I'll be walking you through these these learning bytes.

[00:00:19] Who is a benefit to this video? It's for all levels of TriMetrix expertise. If you're new, or would like a refresher, be sure to go back and watch Video 1. All of the learning bytes are under 20 minutes and we also have reference materials to make it quick to access, such as a transcript and audio, as well as the hiring with TriMetrix reference documents. So take aways to make this digestible and a byte that gives you what you need.

[00:00:46] Here's what's covered today; we're going to talk about job fit, what it is, why it matters, how it's so important, and then how you actually figure out job fit. And the first tool we're going to share with you is the Superior Performance Attributes Worksheet. This worksheet helps you figure out what the job needs for success, and then you take that worksheet and you figure out what the candidate scores were and you see where they match, where there were some gaps, and we figure out how closely they align with what's most important in the job, and that helps you to determine level of fit and your next steps.

[00:01:18] So the Candidate Debrief Worksheet is new, but it's just a way to track notes and to think through, it's a physical, mental map of how you need to think through candidate's assessments and how you need to do this, reduce risk. There's always a risk when we're hiring. These are some basics, we went over in Video 1 and I just want to go through them touch base real quickly. We've got to reduce the risk. Somebody could have a similar job in another organization, there's still going to be a risk, even if they were a high performer or a star there. We need to figure out what's the best fit for the job and then make sure the candidate matches that. We want less of this, where we have good people struggling to drive the car and do their work and more of this. And we use TriMetrix to do that. And when we look at TriMetrix, as a reminder, we use a car analogy to talk about the 3 tools that are measured in TriMetrix, 3 different views, 3 different sciences. How we drive is the DISC assessment, that's what you see, how they move about and behave as they go about their day, as they drive down the street in car analogy, vernacular. Gas intake is not visible. it's the personal interest and attitude values assessment in the TriMetrix tool it is what they're most interested in, is what fills my tank and what empties my tank. And so we want to check for a match on that one. We want to learn more about this person, what matters to them, is not visible on the interview. And then we have lastly horsepower. It's a science called Axiology that measures how we think and make decisions, and

that gives us 23 personal skills that we consider Acumen and things like self management, personal accountability, teamwork, interpersonal skills, things like that, to let us know, again, that is not visible in the interview, but is important to how strong the person performs in the role, and do the top personal skills for this person match what's needed in the job. Department of Labor reminds us less than 30% of any decision is how we apply the assessment.

[00:03:21] Now, here are the 2 tools I want to share with you, the Superior Performance Attributes, those are the things you think about that, what that implies, it's what's top performance, what are the things I need to know about the job so that I can see if the candidate matches. So we've assessed the candidate. The candidate has completed an assessment. We've looked at that assessment. Now we are going to create a Superior Performance Attributes Worksheet for the job, and we have a little checklist to help you with that. Here's a sample of one template that was for an Executive Leader, and this is the end result of what you end up with. You see top priorities in the role, you see then, and you make decisions on the following areas based on those priorities. So they picked, if you see the personal skills, they pick the personal skills that related to the top priorities in the role that were most important for success. There are 23 personal skills. Every one of those personal skills are interesting and good to have. But what is most needed in the job, you see below, that is the, that's the horsepower, personal skills. You see gas in tank, what's the drivers for the job and you see that listed there. They looked at the priorities to help make that decision. And then top behaviors, all of the behaviors are interesting, there's 12 different ones that are measured, which are the 3 that are going to be most important 5 days a week. And so that's how we get the how they drive part of the job. This is a template for the job and this is an outcome of using the Superior Performance Attributes Worksheet.

[00:04:56] What are some of the benefits of doing this? It reduces bias. That's one of the biggest mistakes we have in interviewing. We prefer a particular University, we prefer a particular part of the country, we prefer people who communicate like we do. So we want to reduce the bias that we don't even often know is there, and make sure that we're focusing on fit. "Who is this person in front of me? How can I get to know them and do they match what's needed in the job?" It helps us have more focused interviews.

[00:05:24] So if you have a template like what I just showed you, you know the things that you're looking for and you can use the interview questions that we provide to help you look for those. So you focus on what matters, what's most important for success on the job. The bottom line for this too, is it's going to help reveal matches and gaps. So you'll figure out, "Okay, they don't match in this area, is that going to be an issue? Let me follow up with my interview questions.

Let me talk to references about it or is that something we can work with?" And so it helps you see how much risk you might have in regard to match and then help you make some decisions. And the other thing that it does is, you do not have to be a graph expert to use TriMetrix and to focus on job fit. You can use what we talked about in Video 1, and use this and you will be able to debrief a candidate report confidently and competently.

[00:06:15] So let's go back to the checklist here. We're going to do the 1st step, we're going to select the Superior Performance Attributes for the role. We're going to use the Basic Debrief Worksheet, the Superior Performance Attributes worksheet. So that's what we're going to do now, and here's what it looks like. And you'll see up at the top you see priorities, that's where you list those. You see the main section is where there's 23 personal skills, that's the horsepower you're selecting those, gas in tank is below that, there's 6 of those, there's 12 behaviors. And then we have instructions for each area.

[00:06:51] So first, we're going to start with this, the 3 to 5 priorities in the job. And you want to have a conversation of who do you do this with? You do this with the hiring manager, if they're available, you do it, if you're the recruiter and you try to get people involved, but you read the job description and know what you need in the role and you come up with the top priorities, it would be nice if the hiring manager will work with you. You can have an interview team create this. I've had a room of 24 people who are all hiring the same positions across the country and we created this together. So there's, one person can do it, but you need some type of template to compare the candidate to. Otherwise what, how are you deciding whether someone's a fit or not?

[00:07:34] So here are 3 to 5 priorities, that's what we want to do. Here's an example of a Human Resource Advisor. We did this during a workshop, it was actually at HUB, and this was what the position that the group selected, and we came up with the top priorities. And so we use those priorities and then we're going to use that as we go through the worksheet.

[00:07:53] Here's an example of a Producer. This was within another organization, but they were hiring commissioned sales people. And so here is the top priorities for that position. And that was through a discussion with the hiring manager, how we came up with that, 3 to 5 priorities. The jobs all require many more things that are important, but what's the dashboard? What are the 3 to 5 things that have to happen for the job to be successful?

[00:08:20] So once you have those, then you start selecting the items from the worksheet and if you'll see here, it gives you directions. This is under the hood, that's a reminder, 7, top 7 needed

for mastery. So there's 23 skills. I've mentioned already that they're all skills that are, great skills to have and you'd like somebody to have all of them, but most people do not excel in all of these. So you pick the top 7 based on the requirements or the priorities that you listed in the start. And you see, number 1, interpersonal skills and you can just see number 2; this is a PDF document that you can type on. And as you go forward, you'll see what the order was. They ended up picking 8, I believe, for this one. I have had people sit with me in the car and complete this, I've had a group of interviewers all complete it, and then I've compiled it. I've done it on the phone. I mean, you can do it informal or formal, but you need some type of template and this worksheet will help you do that, help you focus on fit and focus on the match to that fit.

[00:09:23] Here's a, same worksheet for the Producer, if you remember what some of the priorities were for that role, they're picking the top 7 and they there are different priorities. Goal achievement is number 1, the previous, interpersonal skills was number 1. So same assessment, different position, requires different things as priorities, personal accountability, it makes sense, they've got to be able to not blame others if something doesn't happen correctly. Self-starting ability makes sense, they've got, they're working on their own. So you can kind of see the different items that were selected.

[00:09:58] Alright. So we have done the first section of it. Now we're looking at the next section. This is gas in tank. So we looked at horsepower and now it's gas in tank, personal interest, attitudes and values. And this is what we're focusing on here, what does the job most reward? And so for the Human Resource Advisor, they needed to work independently, that's number 1. They needed to be focused 5 days a week on being of service and then help follow and enforce the rules, that seems about right. What is the job going to reward? If you do those things, work independently, serve others and follow and enforce the rules? Those are the main priorities for that position.

[00:10:35] Let's look at Producer and see what they ended up with. The job is going to reward those who value practical accomplishments. And by the way, Utilitarian Economics shows up as a top motivator, top reward, and 80 plus percent of all sales positions, they got to work independently and they've got to learn and become a product expert. And so those are the 3 things you're going to be looking for. And according to the, to this position or this position and this region, that this is what is most needed for success in the role.

[00:11:10] And now we're going to the 3rd area, how we drive. We're back with the Human Resource Advisor. And then this area, the description, the directions are, "Hey, there's 12 of these, pick the top 3 that are needed, most needed throughout the day, every day." And again,

it's a situation of where we tend to do, I do a little bit of this every day, but what are the 3 to 5, and they picked 5, it should be really 3 things that behaviors that are important 5 days a week, people oriented, you see that, versatile and consistent. So we would use the top 3, this was a large group and so we couldn't agree at the time. But that is what you would start with.

[00:11:48] Let's look at Producer, totally different. They've got to be competitive. They've got to have this will to win. They've got to be urgent; they've got to be versatile. And if you'll see with the descriptors over here on the right, if you're familiar with DISC, and that is the how we drive part of the TriMetrix, you'll see it's describing the different DISC styles. But remember DISC is just one piece of the puzzle. We've got how we drive, gas in tank and under the hood, that's why we measure all 3.

[00:12:17] A reminder of the key benefits, reducing bias, having great interviews, helping you know where they fit and where they don't fit. And then allowing you to, anyone, to debrief a report.

[00:12:28] So we finished the checklist, Step 1, now we're going to go to Step 2. And this is a reminder to check for reliability. The under the hood part of the assessment is measuring how well they understood the instructions. And if someone takes a really long time to complete it or their answers are very unusual, it has some concern that maybe they didn't understand. And so we don't want to be ranking or rating someone's match or mismatch in the position if it's an unreliable report and they misunderstood the instructions or got distracted. So we want to pay attention to this. And so I'm going to show you where that is. It is the graph, the under the hood part of the graph that you see 4 dimensional balance page graph, for those of you know, this is measuring under the hood, Axiology, and you look at the Rev score on the lower right, Rev is just made up letters. It's actually reliability, and both of those numbers need to be 0.70 or higher. If they are below that, it tells us that something went wrong. And so that doesn't happen very often. It's about 2% of all the usages of the assessment, and then we ask them to retake it and they just take retake this part. So if you get an unreliable report, 0.7, below 0.70, reach out to me or reach out to your Human Resource Lead and we will give you a sample email and a link. It'll take them about 10 minutes to retake that part, and that way you'll have a reliable report. And so there's no additional cost to HUB, we want to make sure that you have a reliable report when this happens. So want to keep track of that, if you have any questions about that, reach out to me any time or talk to your Human Resource Lead in your region.

[00:14:06] So we've done the 1st part of Step 1, or we did Step 1, we did the 1st part of Step 2, now we're ready to compare the candidate's results to the attributes that have been selected.

And you'll see here where we list the page numbers of the hierarchies that you see and what you would be using to compare the candidates scores to what was selected. This is the new TriMetrix Notes Debrief Worksheet. This is a sample, let me tell you a little bit about what this is, an optional tool to use, but it can help you with the mind map. What you see on the left hand side and that 1st column are the attributes that were selected. What you see in the middle is how they scored. And you see here we've got an opportunity to be very strong to a good match, a fair match and a poor match. And I'm going to show you what that means in a minute. But what you'll see very quickly is you have 3 things that are a Fair Match, or 4 things, 4 areas that are Fair Match, and then the rest is Good to Very Strong. And so your follow up would be on the Fair Match areas.

[00:15:13] You also see an opportunity to list the level of risk, that is just optional, but it's only based on the assessment, not the other areas that you're considering. But it gives you an idea of how closely did they match? 5 is the greatest level of match, there's less risk, and 1 is not a match in many areas, highest level of risk. So this is a way to take notes. You can print this out or you can use it as a PDF and it's type able, but it's a way to use the mind map. Those who are very experienced in TriMetrix are using or taking these steps mentally, and so it will give you a worksheet in order to do that.

[00:15:53] So how do you know whether someone scored Very Strong, Fair or Poor? Here are some examples. We've got the person's score here and we've got the population mean here. So this person scored 73. The mean, this red bar is the 68% of the population, so they are above, that's a Very Strong match. They're far above the mean in both areas. This one's far above 68% of the population. They're greater than the mean, Very Strong match. Here's one where they're closer to the center. They're still above the mean. That's the green. They're a Good match. Now, this is 68% of the population and how they score, that's how we norm the data and gives you another data point. They are below the mean here. That gives us a Fair match. And then when they are below 68% of the population, that's a Poor match. So accountability for others, this person is below the way the rest of the population scored. This is not a strength of theirs. There is no judgment. It's just that's not their strength. We don't want to put them in a role that's going to require that if that's one of the top skills. So we're just looking for fit and match so we can reduce the risk. So that's how we rank it.

[00:17:15] Here is a blank Debrief Notes Worksheet. And just a reminder, this is measuring personal skills, gas in tank and how we drive. First column, you list the attributes. Second column, you compare the candidates and then you use the matching. And then any time that you are using this, we have a, this is a take home document. This is a reference document for



TriMetrix hiring. And it's another learning tool bite that is close by to this video and it lets you take this training with you. So you're watching this today and 2 months down the road, you need to use some of this, everything that you need is in this document. And we had some feedback from a HUB Leader who said, "Okay, this is great, direct links, time saver, exactly what I need." So this is your reference tool and make sure you access this.

[00:18:05] There are some things in the reference document that I want you to read and pay attention to. So I'm pointing those out. I talked about these in Video 1, but go back and read the first part of this. There's a sample email, which you can use, if you don't already have email instructions and send candidates. And then here is the links in Step 2 to the checklist and the worksheet that I just showed you. So you will have that available to you any time. Just make sure you have the TriMetrix Hiring Reference Document, and you will be able to access what we just went through and have that for you to refer to. And here's the Debrief Notes Worksheet that we use. We put the candidate and the benchmark together.

[00:18:50] Okay? So that is the TriMetrix Hiring Reference Document. Make sure you have it, as a reminder we're measuring how we drive, gas in tank, horsepower, it is a tri-modal assessment measuring 3 views. Remember that you're measuring something different with each one. Don't over rely on one area, look at the whole picture. You have to drill down on each area to figure out whether they match or not. At the end of the day, you're going to pull back out and say, "Okay, what's the big picture? What's the whole story?" And we're always going to keep the assessment as less than 30% of any hiring decision.

[00:19:24] So this is learning bite Video 2 of 3, go back and watch Video 1 when you can. And then what we will do on Video 3, is we're going to talk about how to hold a debrief conversation with the hiring manager or other interviewers. So how to share what you've discovered. We're going to look at using the Superior Performance Attributes for development, and we're going to talk about sharing top tools to accelerate and deepen hiring and interview expertise. So I've got many tools to share with you to help you grow in that area as well. If you have any questions or suggestions, please reach out to me, Suzie Price. Thank you.