

## **Talent Acquisition and Selection for the Banking Industry** **Predicting Superior Performance in all Roles** **While** **Building a Self-Managed Culture**

**The Self-Management Solution:** Smart Work | Network, Inc., a Retained Executive Search Firm in Upstate South Carolina, has created a proprietary process called *The Science of Selection* and includes, as our foundational system, the Self-Management Group talent assessment process and tools. All of these tools are built on a statistically validated model that demonstrates the three truly “predictive traits” for identifying candidates for both performance and retention: Self-Management or Enterprising Potential, Motivation or Achievement Potential and Independence Potential or Structure and Systems. These three predictors are foundational to all of our on-line assessment profiles.

**Why the Self-Management Group (SMG) for Banking?** Since 1978 the Self-Management Group has been providing sales and management selection tools to the Banking and Financial Services Industry in Canada and on Wall Street. For most of those 30+ years, they have been the competitive “selection” edge for the top 5 Canadian banking institutions still thriving in today’s competitive economic climate, including *HSBC, the Bank of Montreal, CIBC, TD Bank and The Royal Bank of Canada*.

**How does this help a Bank, large or small, in the US today?** Over 4 million people have completed SMG assessments in management, sales and customer service over these past 3 decades. This huge profile database allows for extraordinary comparative predictability in the selection of superior performers for any financial services organization. This data, applied to your financial services business, can help you select candidates with the “inherent” capabilities to provide your customers with the outstanding interactions and service they require to choose you as their financial services provider.

On the next three pages is an overview of Smart Work | Network and the Self-Management Group *Science of Selection* process and tools:



- **Selecting and Promoting Superior Executive Management and Staff**

**To objectively measure executive and salaried staff for “superior performance”, consider the ManagementPro Assessment process to determine their “fit” to your “superior” culture and to meet your most aggressive goals.**

**ManagementPro™** - A normative personality profile, the ManagementPro™ has been proven to predict performance and retention in management and leadership roles. It assesses those factors that assure managers effectively lead people and performance together. This executive selection tool has also been proven to objectively evaluate the capabilities of existing executive team members for purposes of coaching, team building and conflict resolution. Perhaps its greatest application is in identifying current staff members capable of advancing to management and leadership responsibilities as your enterprise grows and promotes superior performers from within.

- **Selecting Sales Professionals for All Banking Roles – Private Banking Managers, Insurance Managers, Investment Banking Managers, Mortgage Banking Managers**

**SalesPro™ for all Selling roles** - This profiling tool has been customized specifically for the banking industry and adapted from the more “competitive sales” insurance industry profiling assessment. It is designed for those financial positions that require a more consultative and relationship-focused sales approach. This assessment will identify quickly and efficiently those internal and external candidates who possess the hidden talents to achieve top performance while still having the right mix of inherent traits to fit company culture, motivational structure, closing style, communication style, prospecting, handling rejection and self-confidence. This assessment can literally guide you to the right candidates for superior performance in your most critical roles, your sales assignments. For implementing your growth strategy, it helps you begin to raise the bar on “average” sales performance.

***Our significant databank allows us to “norm” the various roles within your Banking/Insurance culture and populates your succession plan with top performers as well as the management of those individuals who will “require” top performance by all.***



- **Coaching and Developing Superior Sales Professionals**

**7 Deadly Sins of Sales™** - This on-line assessment is designed to help you quantify the cause of your sales peoples' struggles. Or, perhaps, to determine what your "superstar" is doing that the rest of your sales professionals are not, so you can replicate that level of performance throughout. This assessment gives you that capability by measuring your sales peoples' daily activities. It allows you to identify those activities that separate the "hunters" from the "gatherers" and the sales makers from the order takers. After completing the assessment, the individual and their manager get a detailed report, called the **7 Habits of Successful Sales Professionals**, identifying the key issues affecting their current sales performance (both good and bad) with their greatest sales strengths (to leverage) and their greatest development opportunities (for coaching). This "no excuses" approach has enabled thousands of sales managers to make their employers much happier while giving them the tool to coach their employees to higher levels of success.

- **Selecting Customer Relationship Professionals for Banking Roles – Tellers, Customer Service Representatives and other Customer Servers**

**CustomerCarePro™** - This assessment tool has been the superior choice of banking and financial services organizations for over 30 years for selecting those "front-line" staff who are critical to building and exceeding customer expectations. In the banking industry, alone, this tool has been used successfully for selecting tens of thousands of top performers in the teller and customer service roles, and significant data is available to compare your tellers and other front-line customer-care professionals with those of world class financial institutions. This tool assesses those traits and attitudes that have been found to be most effective in maintaining long-term customer relationships. It can also help you determine which of your superior performers have what it will take to develop into higher levels of responsibility.

**Service Screen 2.0** – When sourcing "volume", organizations need a cost-effective "screening out" tool which effectively and "humanely" limits staff time to those candidates obviously a fit for their culture. Particularly, with the current abundance of job seekers, high profile institutions are getting overwhelmed by mismatched applications just hoping for a hearing. The Service Screen 2.0 is an inexpensive and legal aid designed specifically for high-volume (sometimes high-turnover) roles to keep the stack of applications to a reasonable and meaningful level. Combined with our automated Recruiting Management System linked to your current website, it is an extremely cost-effective way to make "overwhelmed" and "cumbersome" into "world-class".



- **Managing *The Science of Selection* System cost-effectively and effortlessly with the Self-Management Group Recruiting Management System (RMS)**

**Recruiting Management System** – For less than \$10,000/year, a Bank with fewer than 50 job postings at any one time can maintain the equivalent of a branded “world class” sourcing and recruiting web site. Linked to the Bank’s current web-site, you can automatically source, recruit and assess, externally and internally, candidates for staff openings, transfers from one position to another and transfers from one location to another. Interested individuals review position descriptions, select their choice and upload their applications only after successfully passing through your customized screening process, including “knock-out” questions for minimum requirements and any appropriate assessment (above). Unsuccessful applicants receive a very cordial “regrets” automatic response and successful applicants receive a “congratulations” automatic response. Successful applicants’ information is then categorically stored in an appropriate database for secured access by hiring managers to review for their positions and specific hiring needs.

- **Other Science of Selection Options**

**Executive Team Development – SWNW can provide an Executive Team Development Process that includes any or all of the following:**

- Assessment of Executive Team, including on-line assessment, using the ManagementPro™, individual debriefing and coaching, customized compilation, composite and report out for CEO/HR.
- Off-site retreat and/or workshops based on specific desired outcomes or “deliverables” for management team or Project team development.

**Customized Role-Specific Superior-Performer Job Models - SWNW can develop role-specific competency and performance-based job models for critical roles within the organization for purposes of performance management and succession planning.**

- More comprehensive than traditional Job Descriptions, these job models can be developed for a specific position or level (such as Executive Management level), and can incorporate company or culture-specific values, business goals, performance criteria, core competencies, etc. These job models are designed for “assessment” of new or incumbent staff to insure alignment between incumbent and/or new executives within an organization and provide documented “line of sight” for incumbent managers to corporate goals and objectives.