

Welcome!

The Management Potential Assessment Webinar II:

**How to Use the MPA Post-Hire Reports:
Coaching Suggestions Guidebook and HELM Summary**

October 2017



The purpose of this webinar is to talk about *how to use* these two Management Potential Assessment (or MPA) reports:

- **MPA Coaching Suggestions Guidebook (CSG)**
- **MPA HELM Summary**

These two reports are *post-hire* reports – that is, MPA reports that are designed to be used *after* a hire or promotion decision.

Before we begin, let's go over a few basic points about the MPA from the first webinar.

What Does the MPA Measure?

The MPA measures a person's preferences for how he or she behaves on the job.

Leadership and management positions require that a person be able to operate more independently, and communicate and coordinate with others to accomplish goals and objectives.

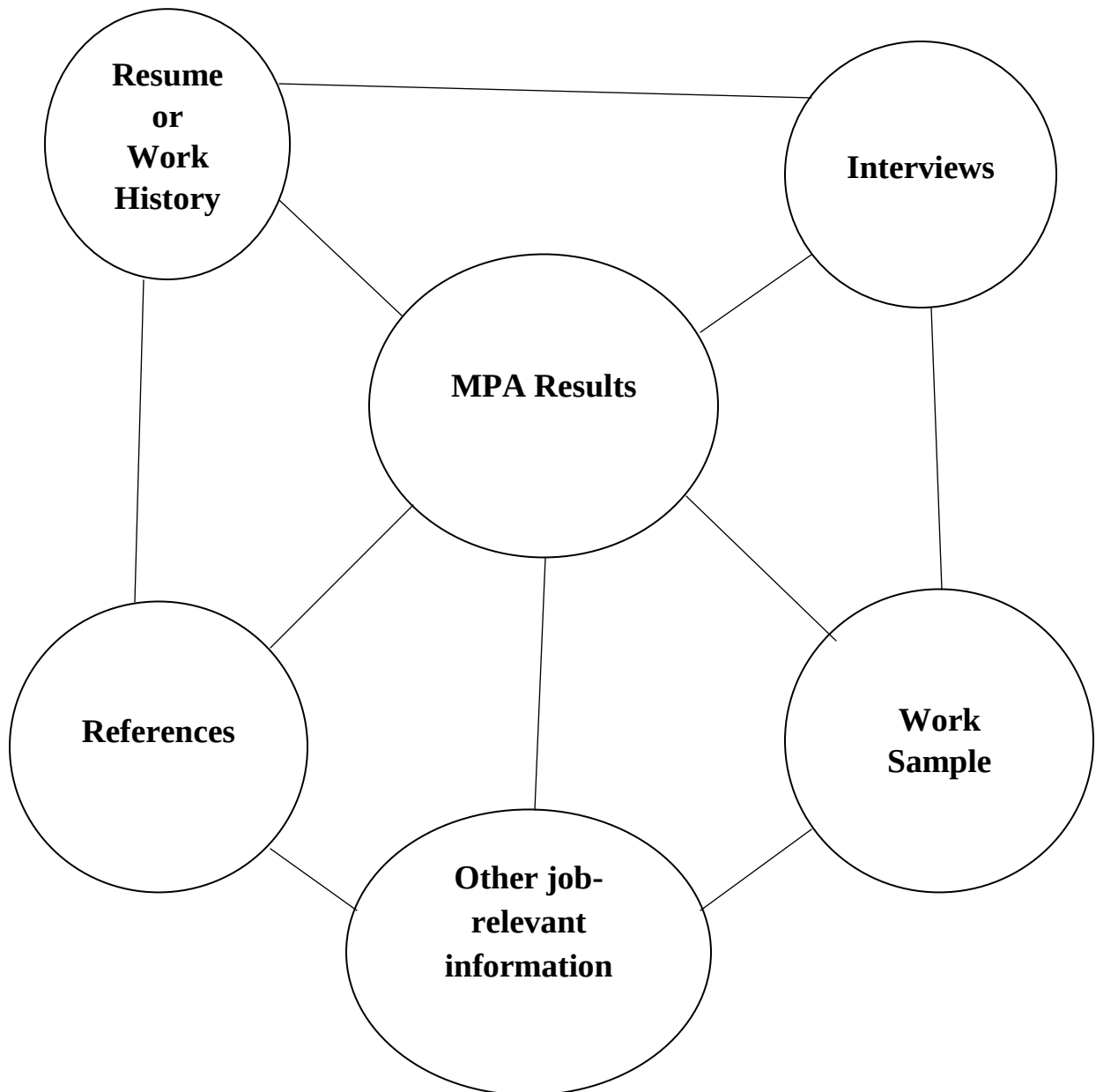
The MPA provides information about a person's strengths and areas of caution or concern with respect to leadership and management potential.

Let's start with the basics.

**There are 5 key points to keep in mind when you are looking
at MPA results:**

The Five Basics

1. Always use information from the MPA *in addition to* all other job-relevant information you have about the candidate:



The Five Basics

2. Start with an understanding of what the job requires

- **Specific skills**
- **Specific knowledge or experience**
- **How will the person in this job spend his or her time?**
- **What demands (physical, mental, etc.) will the person in this job work under?**

The Five Basics

3. Pay attention to the *purpose* of the MPA...

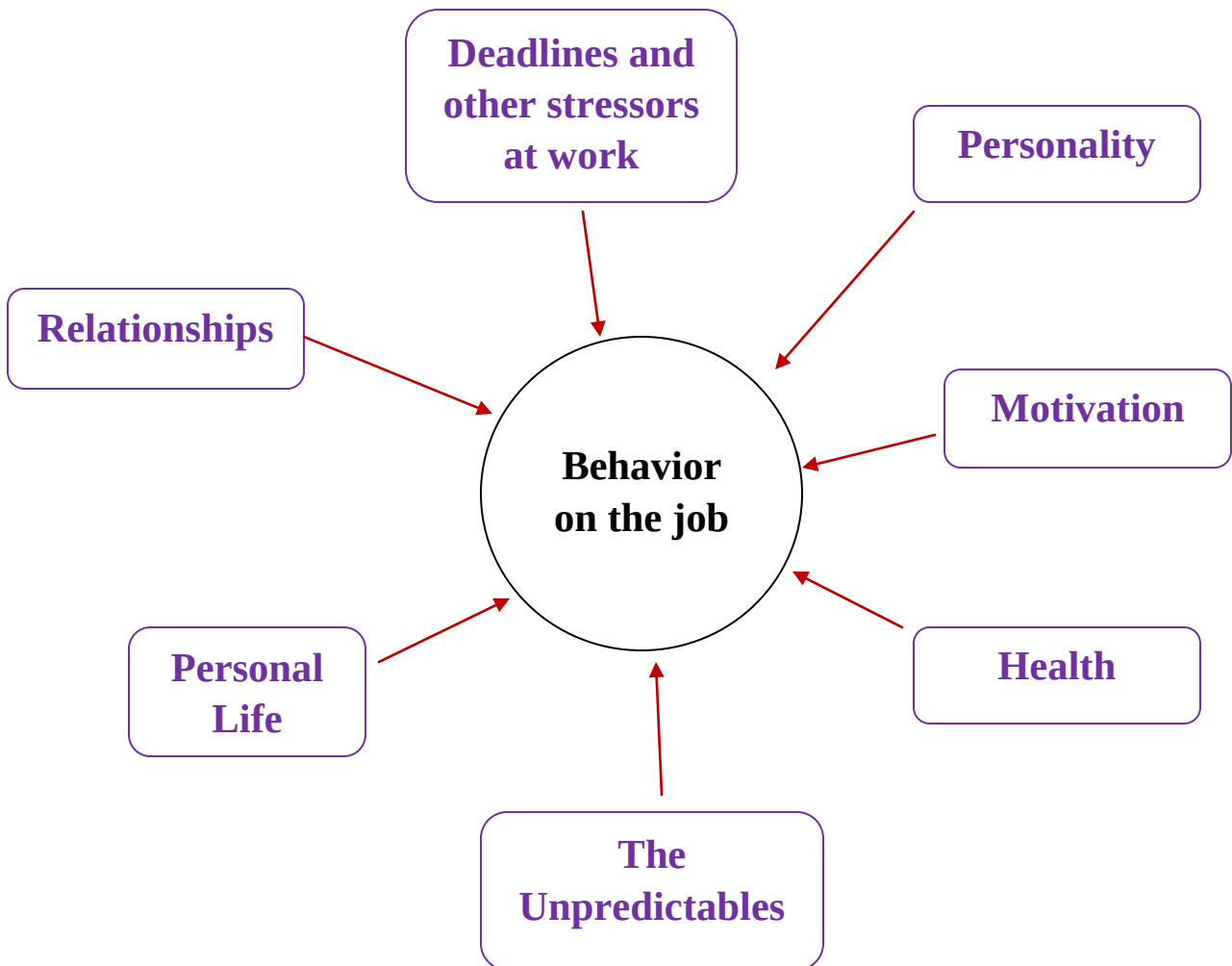
because this is where you match up what the MPA tells you about the candidate with what the job requires of the person who fills it.

The purposes of the MPA:

- **to provide *additional information* during the hiring or promotion process**
- **to provide feedback to the employee so that he or she can use strengths effectively and strengthen cautions and concerns.**

The Five Basics

4. Behavior on the job is affected by many factors, not just personality



The Basics

5. The MPA tells you about the person's underlying work-related preferences, but it doesn't predict exactly how the person will behave on the job.

The MPA *helps you understand* on-the-job behavior that you are likely to see.

Even more important, it helps you understand how to work with the person to help him or her be effective on the job, and this is the focus of the reports we will talk about today.



Here's a helpful tip:

On page 11 of the MPA Training Workbook, there is a chart that shows you all 15 personality characteristics measured by the MPA.

This chart shows you what Behavior Cluster, or Behavior Clusters if there's more than one, that each of those personality characteristics affects.

This chart is helpful because it shows you how underlying personality characteristics can interact to affect behavior in different ways.

Here's the chart:

Personality Characteristics in Behavior Clusters

Characteristics by Behavior Cluster with Job-Relevant Cluster Names					
Characteristic Name:	Work Style	Management Style	Dealing with People	Problem Solving	Mental Toughness
1. Intelligence	Quick Thinking vs. Needs Extra Time and Guidance	Abstract vs. Concrete Thinker		Out of the Box vs. Traditional Problem Solving	
2. Flexibility	Strongly Prefers Change vs. Strongly Prefers the Familiar			Open to New Solutions vs. Prefers the Tried and True	
3. Energy Level	Energetic vs. Deliberate				
4. Impulse Control	Restraint vs. Impulsiveness		Spontaneous vs. Cautious	Careful vs. Rushed	Calm under Stress vs. Emotional under Stress
5. Sociability.			Outgoing vs. Shy		
6. Friendliness.			Too Sympathetic vs. Too Unsympathetic		
7. Team Orientation.		Willing to Delegate Tasks vs. Micromanaging	Trusting vs. Cynical		
8. Assertiveness		Straightforward vs. Timid	Assertive vs. Not Assertive		
9. Organization/Structure/Planning		Plan It vs. Wing It			
10. Big Picture Orientation	Big Picture vs. Detail Approach			Big Picture Preference vs. Detail Preference	
11. Decision-Making Strategy.				Logical vs. Intuitive	
12. Coachability.	Open vs. Resistant to Others' Ideas				
13. Take-Charge Tendencies.		Initiates Action vs. Waits for Direction			
14. Emotions and/or Moods.					Even-Keeled vs. Worrier
15. Objectivity.			Thick-Skinned vs. Sensitive		Focus on Issue vs. Self

Note: This Chart is available in the MPA Training Workbook on page 11

Let's look now at how you use the post-hire reports.

The Coaching Suggestions Guidebook (CSG)

The purpose of the CSG is to provide you with coaching or mentoring tips, *if they are needed*, that are customized for this specific person.

After the person is hired, information about a person's personality-driven strengths and concerns is extremely useful in helping the person be successful on the job because:

- it gives you a way to give the person constructive feedback about his or her MPA results;**
- it gives you, if you are his or her supervisor, insight about *why* a person behaves in certain ways;**
- it gives you customized, specific, *constructive* words to use to discuss ways to improve behavior with an employee.**

The Coaching Suggestions Guidebook (CSG)

Here are the main points to remember about using the CSG:

- **Coaching suggestions are provided for *every* personality characteristic in each Behavior Cluster – strength, caution, or concern.** *Why do we include coaching suggestions for strengths? Because sometimes people tend to over-use a strength to such an extent that it actually works against his or her effectiveness!*
- **You do not have to use every suggestion!** *Remember, the suggestions are there to use AS NEEDED, IF NEEDED.*
- **Use these suggestions to talk with an employee about behavior that needs improvement (don't use them as a list of things the employee must do.)** *Nothing could be more intimidating to a new employee than to be given a laundry list of "defects" that need to be corrected.*
- **When there is a performance issue that you want to deal with, first use page 11 of the MPA Training Workbook to identify all of the coaching suggestions that are related to the issue you want to talk about.**

The Coaching Suggestions Guidebook

Management Potential ● Assessment

For Banks

Coaching Guidebook

For:
Sample, Samuel D.

Sample Bank
08/31/16

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H E L M
AND ASSOCIATES, INC.

The cover protects confidentiality

The Coaching Suggestions Guidebook

Sample Bank Coaching Guidebook

Name: Sample, Samuel D.

Date: 08/31/16

Page: 2

Tips for how to be a good coach – it's only one page! Review it to add tools to your set of skills.

Suggestions for using the Guidebook

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1. How to Be a Good Coach	3
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7. PROBLEM SOLVING Coaching Suggestions	9
8. MENTAL TOUGHNESS Coaching Suggestions	10
9. Coaching Log Template	11

A page of suggestions for each Behavior Cluster

The Coaching Suggestions Guidebook

Sample Bank Coaching Guidebook

Name: Sample, Samuel D.

Date: 08/31/16

Page: 6

Coaching Suggestions: Use any of the following coaching suggestions as needed to help this person improve on the job, or if you notice behavior that could be improved. Customize them to fit the circumstances and the person as necessary.

[Management Style Coaching Suggestions \(p. 7\)](#)
[Dealing with People Coaching Suggestions \(p. 8\)](#)

[Problem Solving Coaching Suggestions \(p. 9\)](#)
[Mental Toughness Coaching Suggestions \(p. 10\)](#)

1. Samuel's Work Style:

- ➡ **Energetic vs. Deliberate:** He prefers a slow, deliberate work pace and may have limited stamina. Encourage him to manage his work pace carefully so that he has enough stamina and reserves of energy when an extra effort is required by the job. Help him also by encouraging him to evaluate his lifestyle carefully to identify any habits that may be limiting his energy level.
- ➡ **Open vs. Resistant to Others' Ideas:** He is not easily coached; he tends to believe that his opinion or approach is best. He may listen more willingly to people that he feels know what they are talking about, but without that credibility, he will tend to dismiss advice from others. Use instances that did not go well after he has followed his own judgment rather than good advice from others as "teaching moments." Encourage him to take an extra moment to consider advice and coaching from others, separate from his opinion of their credibility, and then to extract the useful information from the coaching.
- ➡ **Strongly Prefers Change vs. Strongly Prefers the Familiar:** He values change for its own sake such that he may not always think through the usefulness or consequences of actions that he takes. Encourage him to think through the consequences of his actions by requiring him to present an analysis of the reasons in favor of, and against, the change or action that he proposes, along with the benefits that he expects. Help him learn to see where his analysis may overlook difficulties or barriers to making the change immediately, so that he can learn to make more realistic proposals and plans.
- ➡ **Big Picture vs. Detail Approach:** His work style is characterized by a strong focus on specific facts and details in his work. This is such a strong preference that he may end up solving similar problems as if they were new each time, rather than seeing overall patterns in the same types of situations. Help him learn to put problems in context by requiring him to explain his plans in terms of the overall objective. Remind him to look for patterns in problems to help him see the "big picture" and use that point of view to put details in perspective.
- **Restraint vs. Impulsiveness:** His work style will usually be neither too rushed nor too deliberate. He uses restraint effectively. Unusual impulsiveness may be a signal that stress in some area is having an effect on his work. If you see a pattern of impulsive behavior, bring it to his attention and explore ways with him to handle the situation more effectively.
- ➡ **Quick Thinking vs. Needs Extra Time and Guidance:** A major strength of his work style will be his ability to learn quickly. He will enjoy mental challenges. He enjoys seeing all sides of an issue but may spend so much time thinking about possibilities and potential outcomes that he misses the moment when action must be taken. He will be most effective when he is given deadlines and the real-time limits within which decisions must be made to help him manage his tendency to over-think things. In addition, coach him to be patient with people who learn more slowly than he does.

Color coding
as on the
MPA Results
Report:
Green is
strength;
Yellow is
caution;
Gray is
concern.

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The Coaching Suggestions Guidebook

Sample Bank Coaching Guidebook

Name: Sample, Samuel D.

Date: 08/31/16

Page: 6

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- ➡ **Big Picture vs. Detail Approach:** His work style is characterized by a strong focus on specific facts and details in his work. This is such a strong preference that he may end up solving similar problems as if they were new each time, rather than seeing overall patterns in the same types of situations. Help him learn to put problems in context by requiring him to explain his plans in terms of the overall objective. Remind him to look for patterns in problems to help him see the "big picture" and use that point of view to put details in perspective.
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[Work Style Coaching Suggestions \(p. 6\)](#)

[Dealing with People Coaching Suggestions \(p. 8\)](#)

[Management Style Coaching Suggestions \(p. 7\)](#)

[Mental Toughness Coaching Suggestions \(p. 10\)](#)

4. Samuel's Problem Solving:

- ➡ **Out of the Box vs. Traditional Problem Solving:** He enjoys the challenge of solving problems and likes to “think outside the box” about possibilities and outcomes. He may become so interested in devising clever solutions to problems that he overlooks the need to help co-workers understand his intentions. Encourage him to be patient with co-workers who do not see the possibilities that he sees.
- **Careful vs. Rushed:** He will usually evaluate most problems carefully, thereby avoiding either the first solution that comes to mind or the tendency to over-think the problem and miss the best moment to act on a solution. A pattern of impatiently implementing the first solution that comes to mind may be a signal that stress in some area is having an effect on his judgment. If you see such unusual behavior, bring it to his attention and work with him on better ways to handle the stress.
- **Logical vs. Intuitive:** He has a strong preference for making decisions based on intuition and personal values; he may not be able to provide logical reasons for why he has made a decision. He needs to learn how to identify situations where his decision-making process should be more logical. Help him find logical reasons to explain the rationale for his decisions, in some cases before he takes action on the decision. Make sure that he does not dismiss aspects of a situation simply because they don't seem important to him.
- ➡ **Open to New Solutions vs. Prefers the Tried and True:** He values change for its own sake, so much so that he may “throw out the baby with the bath water” when it comes to solving problems. He will often prefer to start over with a fresh approach rather than modify existing processes. Encourage him to think about both the benefits and the possible unforeseen consequences of trying something completely new.
- ➡ **Big Picture Preference vs. Detail Preference:** He will seem to be uninterested in arriving at an overall understanding of the essence of the problem that needs to be solved, focusing instead on “what can I do right now?” He will tend to get lost “in the weeds” – in how to do the details – when he is working on a problem. Help him learn to see small problems as possible signals of underlying systemic situations where one needs to take a broader view in order to find a good solution.

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Coaching Tips

- **The goal of coaching or mentoring an employee is to help that person improve – to be “better than yesterday” – not to be perfect!**
- **Discuss performance in terms of behavior, not personality (this is coaching, not therapy;)**
- **Recognize the person’s good intentions first, and then talk about needed behavior improvement;**
- **Be a good listener, be patient, and be a mirror;**
- **Use the suggestions in the CSG to give you the language – the words – to talk about performance issues.**

The HELM Summary

This is the report that is specifically designed to be given, *with explanation*, to the employee.

Most people want to know how they have done on “tests” and questionnaires that are part of a selection process, the HELM Summary gives you a constructive way to do that.

The HELM Summary is a 2-page report. It’s designed to be descriptive, constructive, and *brief*.

It starts with the person’s DASHBOARD, and it shows the person where his or her growth opportunities are:

Your Behavior Clusters Dashboard:

				
Work Style	Management Style	Dealing with People	Problem Solving	Mental Toughness

Behavior Clusters are based on the interaction of underlying personal preferences that you indicated in the HELM questionnaires you answered.

This is an excerpt from the first page of the HELM Summary

It goes on to briefly describe, for each Behavior Cluster, the person’s preferred behavior, and then useful TIPS to improve performance:

HELM Summary



The HELM Summary

Name: Samuel Sample

Date: 08/31/16

Position: Loan Manager

Your Behavior Clusters Dashboard:

Work Style	Management Style	Dealing with People	Problem Solving	Mental Toughness

Behavior Clusters are based on the interaction of underlying personal preferences that you indicated in the HELM questionnaires you answered.

How to Use This Report:

Share these pages with your manager or a trusted coach/mentor so that he or she can help you. Feedback, suggestions, and encouragement from others are valuable sources of help.

TIPS are provided for areas of greatest need at this point in time, and information at the bottom of each page directs you to more information.

Here's More About YOU! Use these tips to become more effective on the job!

 Work Style describes your preferred overall behavioral style on the job – energy level, organization, delegating tasks, and more	Your Strengths	* Even-keeled; good balance between being too restrained and too impulsive
	Your Cautions	* Quick thinker; makes mental connections rapidly; may be impatient * Likes a dynamic, changing environment; may become bored with routine * Deliberate work pace; prefers to exert only the amount of energy required * Focuses on specifics and facts; less interested in ideas * Doesn't value advice or coaching from people who are not credible to him
	TIPS FOR YOU	* Avoid over-thinking a situation, enjoyable as that may be, by setting deadlines for taking action * Anticipate unintended consequences before making changes in routines and procedures * Manage lifestyle choices (diet, exercise, sleep, etc) to enhance energy and stamina for entire shift * Keep the overall goal of a project in mind as you deal with the specifics to avoid effort wasted on unimportant details * When others offer suggestions or advice, regardless of whether they seem credible to you, listen for useful information

 Management Style describes how you prefer to lead and direct the activities of others	Your Strengths	* Usually able to find a good balance between leading and pushing employees * Understands the need for preparation and organization
	Your Cautions	* Quick learner; may be impatient with people who learn slowly * Has difficulty delegating; doesn't trust others to get things done * Seeks approval before initiating action; may over-rely on procedures
	TIPS FOR YOU	* Remember to set realistic expectations for others that are based on a non-judgmental assessment of their capabilities * Instead of blaming others when things go wrong, show them how to do better * Rely on life and work experience to offer suggestions and solutions at work

More coaching suggestions are available in the HELM Coaching Suggestions Guidebook (CSG).

HELM Summary



The HELM Summary

Name: Samuel Sample

Date: 08/31/16

Position: Loan Manager

Your Behavior Clusters Dashboard:

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More coach

The second page of the HELM Summary includes the other Behavior Clusters: Dealing with People, Problem Solving, and Emotional Toughness.

Detail from HELM Summary

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Key Points to Include in Explaining the HELM Summary

- ***It's not about "how many" strengths or "how many" cautions a person has on his or her HELM Summary!***

BancFirst has already concluded that this person will be an asset to the bank, and the HELM Summary simply shows the person where he or she has opportunities to become even more effective.

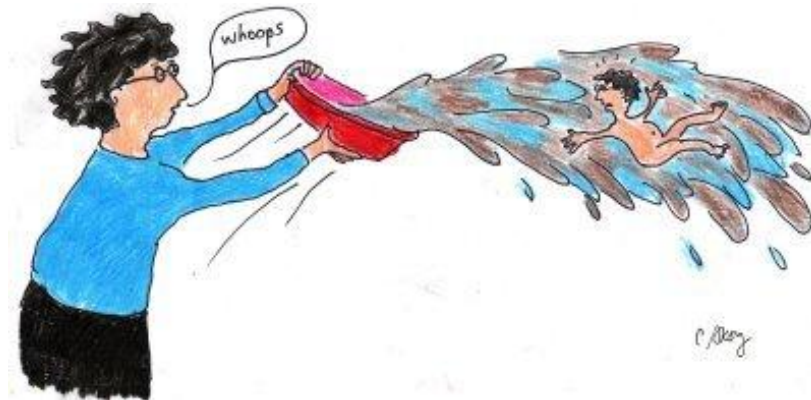
- **The HELM Summary may include descriptions of preferences that the person already knows about and manages successfully. If so, great! If not, here are some tips that the person can use as needed to improve performance.**
- **Remind the employee that the descriptions in the HELM Summary are based on what he or she said were personal preferences on the MPA questionnaires.**
- **Tell the employee that preferences don't *predict performance* – they describe factors that *influence* behavior.**

The Desired Outcomes of Showing the HELM Summary to the Employee:

- **It shows the employee that you aren't looking for perfection, but for willingness to learn and improve;**
- **It gives you and the employee a common vocabulary to use when you talk about unproductive behavior on the job;**
- **It raises the employee's awareness of his or her strengths and areas where he or she may need to improve performance.**

When Someone Disagrees with the HELM Summary

Having a person disagree with information in the HELM Summary is not uncommon...



but don't throw the baby out with the bath water!

If either of you disagree with information in the HELM Summary, have the employee show it to at least 2 people who know them well, people that they trust. They will almost always get feedback that sounds something like this: “yeah, I can see that....”

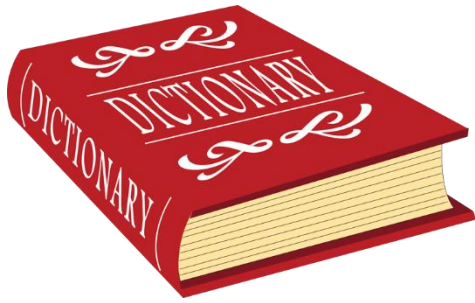


The Management Potential Assessment is a *tool*:

- **To add objective information to your knowledge and understanding of a candidate;**
- **To increase your understanding of a candidate's likely behavior on the job;**
- **To help you understand how to help the person who is selected adjust to the job, to the company, and to be productive on the job;**
- **To give the employee feedback and suggestions about how to improve his or her job-related performance.**

Appendix

In case you weren't able to listen to the first MPA Webinar, I've included information about the important ideas on which the MPA is based.



Let's define some terms that you will hear me use, and that are important parts of the MPA:

- **Personality Characteristic**
- **Benchmark Range**
- **Behavior Cluster**

What Is A “Personality Characteristic”?



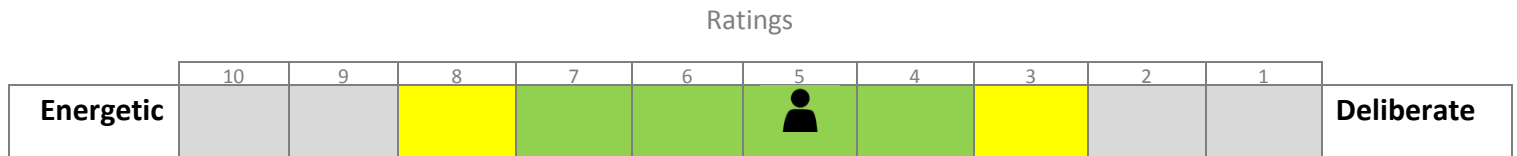
The MPA measures 15 underlying characteristics. You can find them listed and then defined in the MPA Training Workbook on pages 6-9.

The online MPA questionnaires measure the strength of each of these characteristics by asking *many questions* about how the person prefers to act on the job.

The strength or “amount” of each characteristic for a person who takes the MPA is shown by an avatar (🧑) on a scale from 1 to 10.

 **Remember: don't assume that you understand a characteristic based only on its name. Be sure to read about the characteristics in the MPA Training Workbook on pages 6-9.**

The strength or “amount” of each characteristic is shown by an avatar (👤) on a scale from 1 to 10:



The “amount” shown on the 10-point scale is *relative to the thousands of other people who have completed MPA questionnaires*.

The strength of personality characteristics, as well as intelligence, height, and all kinds of other attributes, is normally distributed across the population.

That means that, for most of us, the measurement of the strength of our preferences tends toward the middle of the 10-point scale.

Put another way, none of us is a perfect “10” on all of these characteristics.

How do we show the desirable range of results on the MPA results? We show them as Benchmark Ranges.

What Is A “Benchmark Range”?

We’ve analyzed the responses of thousands of people who have answered the MPA questionnaires.

We compare those responses to what is required for similar kinds of positions and figure out the patterns that work best for those positions.

These patterns are called “benchmarks.”

There are three benchmark areas:

- **Strength**
- **Caution**
- **Concern**

What Is A “Benchmark Range”?

We’ve analyzed the responses of thousands of people who have answered the MPA questionnaires.

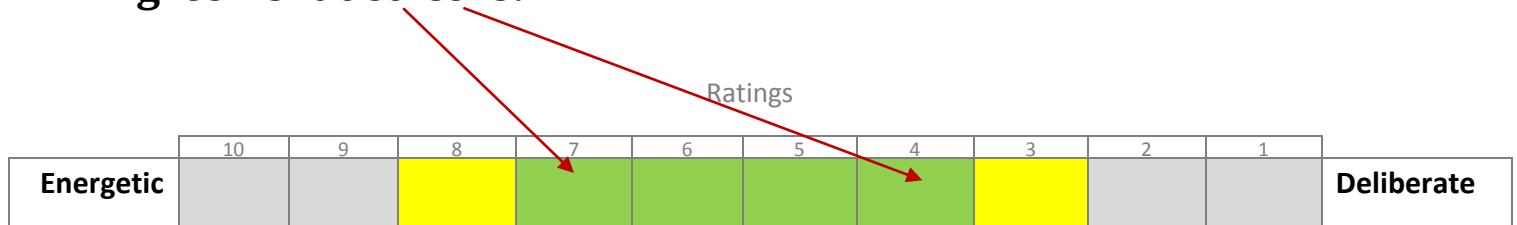
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There are three benchmark areas:

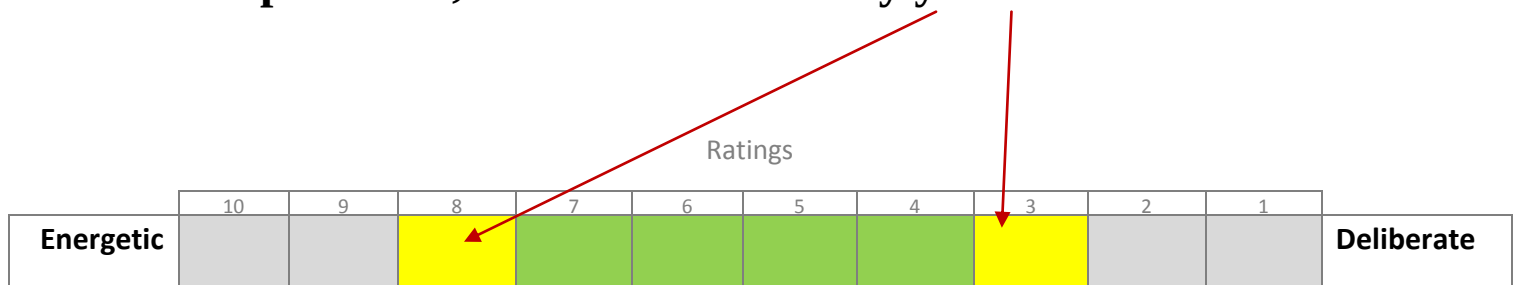
- Strength
- Caution
- Concern

“Strength” means *desirable*, and this range is indicated by green-shaded cells:

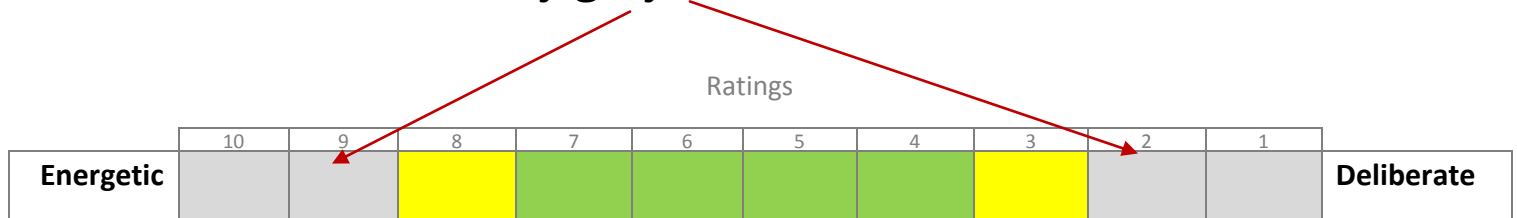


What Is A “Benchmark Range”?

“Caution” means that this person’s behavior on the job *may* cause problems, and it is indicated by yellow-shaded cells.



“Concern” means “out of benchmark range.” This characteristic will likely have a negative effect on behavior, and it is indicated by gray-shaded cells.



What Is A “Benchmark Range”?

 **Remember:** results that are in the “Caution” or the “Concern” area are not necessarily a disqualification for the candidate.

Always keep in mind what the job requires and the person’s other qualifications:

- **How important is this characteristic for successful performance on the job?**
- **What other characteristics may be more important, or may tend to offset this one?**
- **What skills, knowledge, experience, or other abilities will tend to offset these cautions and concerns?**

What Are “Behavior Clusters”?

The 15 personality characteristics combine to affect job-related behavior in 5 key Behavior Clusters:



What Are “Behavior Clusters”?

For each of the five Behavior Clusters, we show you whether that area is, *for this person*, a strength, a caution, or a concern.

And then, for each Behavior Cluster, we show you the personality characteristics that affect it and describe the person's likely behavior.

We'll look at an example in just a minute, but let's go over the definitions of each Behavior Cluster first.

Behavior Clusters



Work Style

The person's overall work style on the job: energy level and stamina, willingness to accept direction or advice from others, approach to planning and understanding problems, overall ability to learn new information.



Management Style

How this person will lead and direct the activities of others: willing to take charge of situations, delegate tasks and follow up, comfortable asking questions, presenting unwelcome information, likely to plan before taking action.



Dealing with People

How this person will interact with people: energized by being around people or prefers to work independently, willingness to make an effort to get along with others, straightforward or not, diplomatic or tactless.



Problem Solving

How this person uses information to solve problems and challenges: ability to control emotional reactions in order to focus on finding solutions, able to blend logical and intuitive thinking.



Mental Toughness

This person's ability to manage his or her emotional reactions and moods: able to remain calm in stressful situations, ability to focus on the situation.

See page 10 in the MPA Training Workbook for these definitions.



Here's where you can find this information in the MPA Training Workbook:

Pages 6-9 – definitions of each of the 15 personality characteristics.

Page 10 – definitions for each Behavior Cluster

Pages 12-13 – explanation of Benchmark Ranges