FINANCIAL SERVICES TEAM

Beginning Environment: This study included 59 incumbents in one position who had over one year of recorded performance against four *objective* **key performance indicators (KPIs).** All incumbents completed a whole-person assessment measuring 20 individual characteristics.

Initial Actions: We first combined the assessment results with their performance scores and used regression analysis to (statistically) identify that they had 9 Top Performers, 40 Middle Performers, and 10 Bottom Performers. We then used the Top Performers results create the high-performer benchmark.

Analysis Process: After confirming the benchmark was predictive for all four KPIs, we added **machine learning algorithms** to prove which specific characteristics (out of the 20) were **most important in predicting performance**. We then built a *Predictive Scorecard* that **accurately predicted which group each incumbent would end up in (Top, Middle, or Bottom)** - 59 out of 59 times, or with **100% accuracy!** And we showed the client how to use this scorecard to focus their training and development efforts to reap the highest benefits.

Results: *Top Performers* **Overall job match** score was *17 points higher* and they completed **80 more transactions/year** than the *Bottom Performers*. *They also were more accurate so there was less rework required.*

Costs: $26,500 (including assessment costs to cover their next 10 hires)

Benefits: Historically, 20% of this team's hires were Top Performers and 20% were Bottom Performers, and this team plans to add 10 new people in the coming year. If they use this information to hire 2 more Top Performers and prevent them from hiring 2 Bottom Performers, it would result in 160 additional closed transactions per year. At an average profit of $1,500/transaction, this would be $240,000 additional profit.

ROI: ($240,000 - $26,500) / $26,500 = 806%

Key Numbers:

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59 people in the same role with at least 1 yr. of performance history

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4 KPIs measured for each incumbent

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Accurately predicted performance in ALL 4 KPIs

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ROI = 806%

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