

# Predictive Success Corporation

Analytics for Succession Management

Evidence Beats Opinion.



**MAXIMIZING OPPORTUNITY  
MITIGATING RISK**

**2018 CAMA CONFERENCE**

**MAY 28-30, 2018**



# Challenges



- Recruiting the next generation

- Streamlining the application and hiring process



- Finding talent

- Developing effective succession plans



# About Predictive Success Corporation

- Our head office is located in Whitby, Ontario
- Worldwide publisher Head Office in Boston, Mass
- We have been trusted advisors for over 62 years with over 500+ clients in Canada, 7000 Globally
- Profit 500 Canada Company 2013-2016



# What We Do:

We help you make better people decisions. Using predictive data we can help you achieve tangible business improvements.

*Our solutions will help you:*

- **Succession Plan**
- **Require, Hire, Inspire Leaders**
- **Find and Hire the Right People**

*PI complies with standards and guidelines*

- **Equal Employment Opportunity Commission (EEOC)**
- **Meets Canadian privacy laws**
- **American Psychological Assoc. (APA), Internal Test Commission (ITC)**
- **Over 500 validation studies**



# Leaders must own



SUCCESSION  
PLANNING



DISCOVERING  
HI-PO's + LEADERS



HIRING SELECTION  
ONBOARDING



EMPLOYEE  
ENGAGEMENT +  
RETENTION



TEAM  
DEVELOPMENT

# How Does Predictive Index Work?



**Page 1:**  
DIRECTIONS: Please read the words in the list below and check those that you feel describe **the way you are expected to act by others.**

<input type="checkbox"/> Helpful	<input type="checkbox"/> Esteemed	<input type="checkbox"/> Calm
<input type="checkbox"/> Relaxed	<input type="checkbox"/> Worrying	<input type="checkbox"/> Popular
<input type="checkbox"/> Exciting	<input type="checkbox"/> Sentimental	<input type="checkbox"/> Polite
<input type="checkbox"/> Assertive	<input type="checkbox"/> Adventurous	<input type="checkbox"/> Dynamic
<input type="checkbox"/> Patient	<input type="checkbox"/> Easy Going	<input type="checkbox"/> Good-Humored
<input type="checkbox"/> Conscientious	<input type="checkbox"/> Unassuming	<input type="checkbox"/> Escapist
<input type="checkbox"/> Sophisticated	<input type="checkbox"/> Good mixer	<input type="checkbox"/> Generous
<input type="checkbox"/> Persistent	<input type="checkbox"/> Agreeable	<input type="checkbox"/> Unobtrusive
<input type="checkbox"/> Earnest	<input type="checkbox"/> Well-liked	<input type="checkbox"/> Daring
<input type="checkbox"/> Outstanding	<input type="checkbox"/> Docile	<input type="checkbox"/> Tolerant
<input type="checkbox"/> Sympathetic	<input type="checkbox"/> Demanding	<input type="checkbox"/> Nice
<input type="checkbox"/> Loyal	<input type="checkbox"/> Charitable	<input type="checkbox"/> Compelling
<input type="checkbox"/> Self-Starter	<input type="checkbox"/> Resolute	<input type="checkbox"/> Resolute
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<input type="checkbox"/> Eloquent	<input type="checkbox"/> Careful	<input type="checkbox"/> Cultured
<input type="checkbox"/> Cynical	<input type="checkbox"/> Satisfied	<input type="checkbox"/> Dominant
<input type="checkbox"/> Passive	<input type="checkbox"/> Understanding	<input type="checkbox"/> Respectful
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<input type="checkbox"/> Appealing	<input type="checkbox"/> Obedient	<input type="checkbox"/> Attractive
<input type="checkbox"/> Thoughtful	<input type="checkbox"/> Cheerful	<input type="checkbox"/> Trusting
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<input type="checkbox"/> Competitive	<input type="checkbox"/> Responsive	<input type="checkbox"/> Fussy
<input type="checkbox"/> Fashionable	<input type="checkbox"/> Neighborly	<input type="checkbox"/> Versatile
<input type="checkbox"/> Neat	<input type="checkbox"/> Selfish	<input type="checkbox"/> Amiable
<input type="checkbox"/> Audacious	<input type="checkbox"/> Reserved	<input type="checkbox"/> Diplomatic
<input type="checkbox"/> Polished	<input type="checkbox"/> Serious	<input type="checkbox"/> Self centered
<input type="checkbox"/> Fearful	<input type="checkbox"/> Persevering	<input type="checkbox"/> Consistent

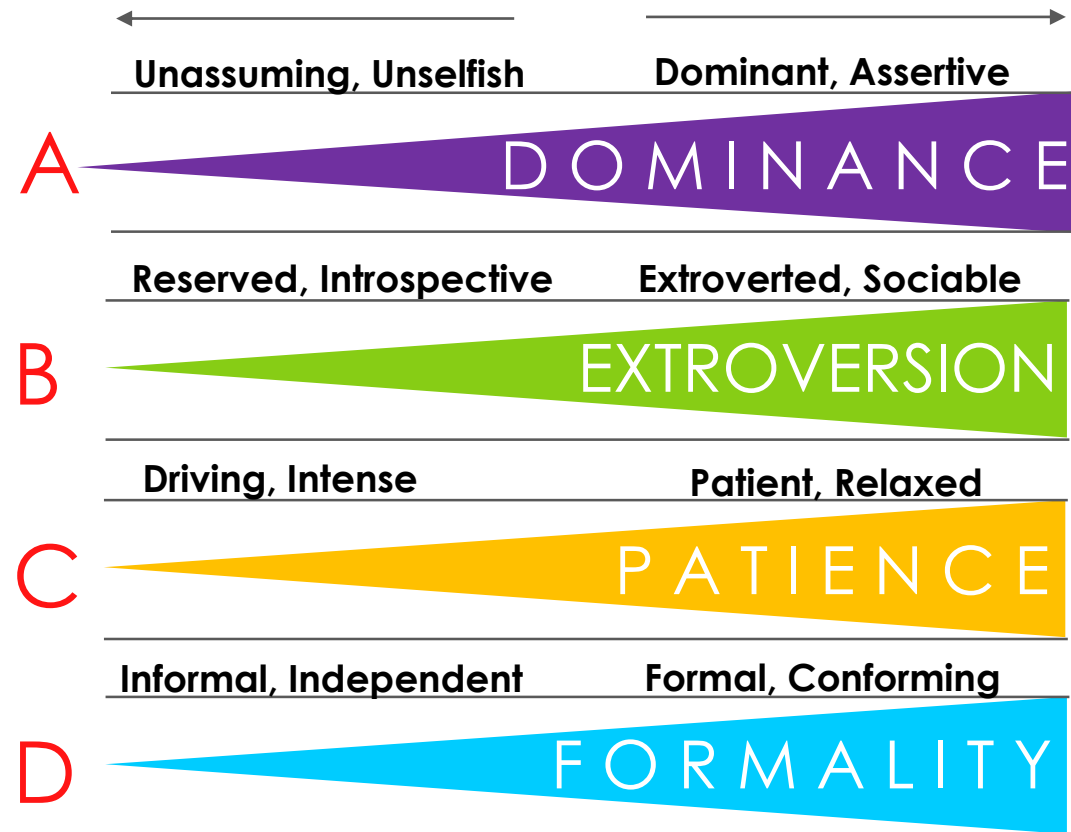
**Page 2:**  
DIRECTIONS: Continue by reading the words in the list below, now checking those **that you yourself believe really describe you.**

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<input type="checkbox"/> Relaxed	<input type="checkbox"/> Worrying	<input type="checkbox"/> Popular
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<input type="checkbox"/> Polished	<input type="checkbox"/> Persevering	<input type="checkbox"/> Self centered
<input type="checkbox"/> Fearful		<input type="checkbox"/> Consistent

- PI is a Stimulus Response Instrument
- Using a Free Choice Checklist methodology
- There are 172 words associated with specific behaviours
- Human behaviour is the product of response to stimuli

# Predictive Index Analytics for Succession

- Drive to **exert one's influence** on people and events
- Drive for **social interaction** with other people
- Intensity of a person's **tension and pace**
- Drive to conform to **formal rules and structure**





# Job Assessment



PRO®

Instructions

Page 1

Page 2

Page 3

☐ Checking the details of work for accuracy

☐ Working at a consistent and steady pace

☐ Meeting scheduled deadlines

☐ Making major decisions independently

☐ Being calm and patient at all times

☐ Carrying out instructions carefully

☐ Developing friendly personal relations with others

☐ Establishing priorities for the activities of others

☐ Collecting and analyzing data

☐ Checking to ensure that work meets quality standards

☐ Solving new or unfamiliar problems

☐ Handling repetitive work without becoming impatient

☐ Assuring compliance with laws and company policies and regulations

☐ Cooperating with team or committee decisions

☐ Being responsible for security of company property

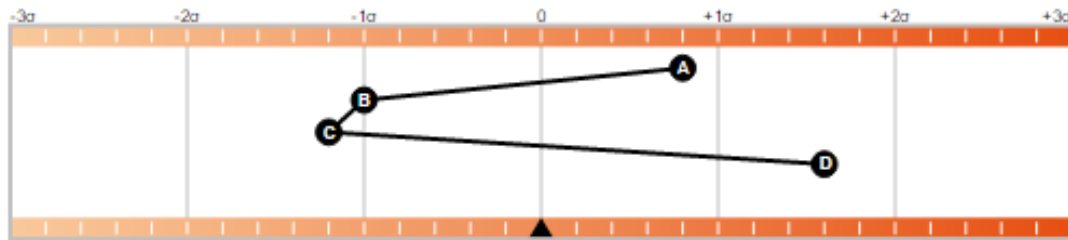
☐ Providing services, support or information by telephone

☐ Maintaining a consistent work pace for long periods

☐ Being responsible for a number of varied activities

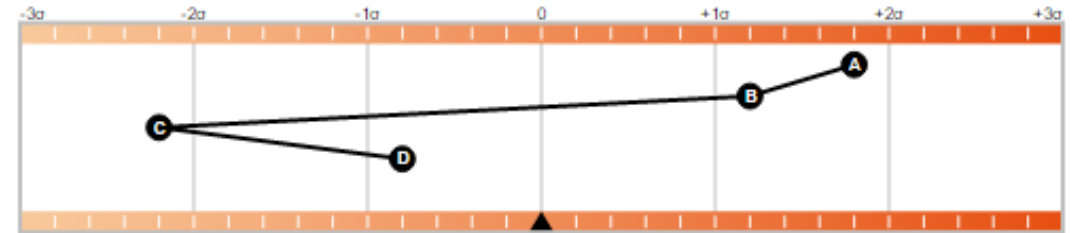
# Municipal Job Models

## Planning Infrastructure



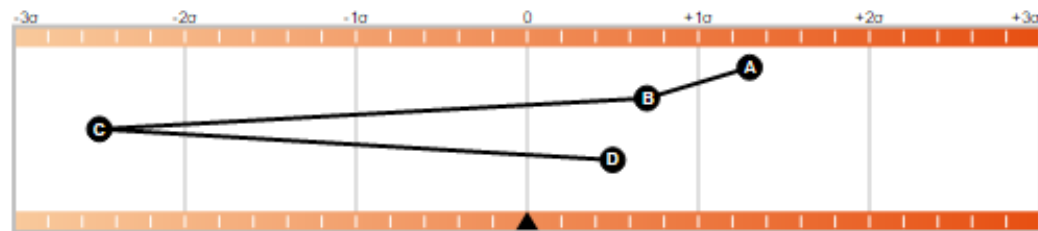
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## Business Development



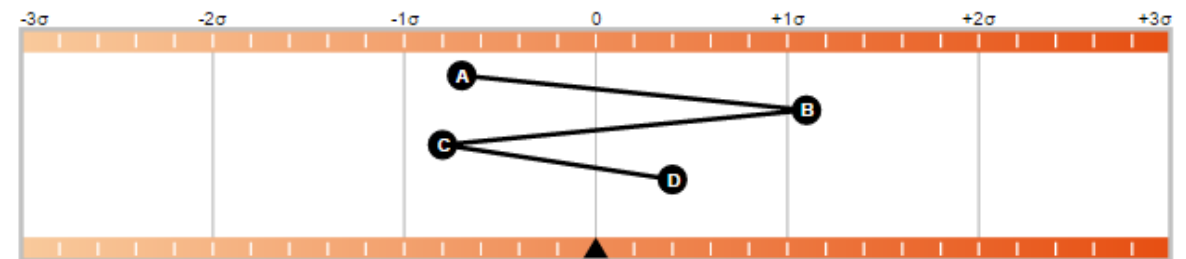
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## IT Manager



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## 311 Support Specialist



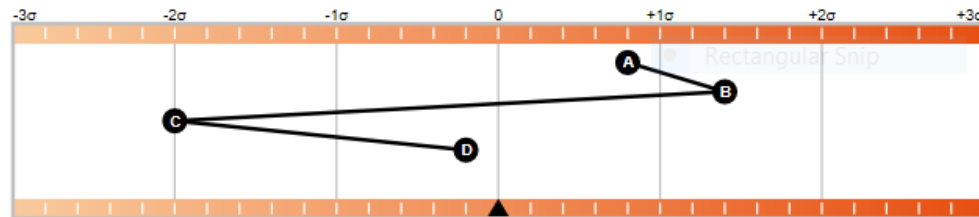
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# Fit Gap Analysis: The Role vs. The Person

- Two Behavioral Assessments

## Behavioral Demands of the Job Job Assessment

### Business Development



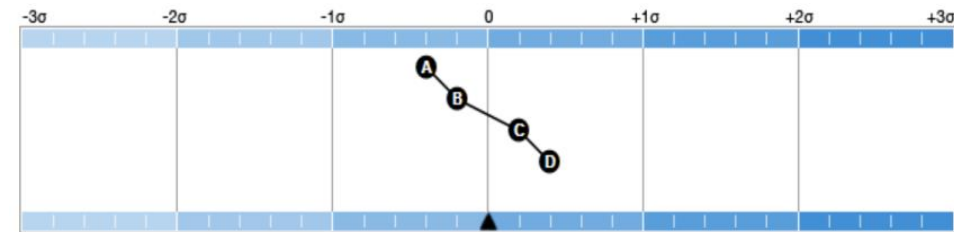
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Assertive, competitive, take charge  
Connects quickly with people  
Pro-active, strong sense of urgency  
Thinks on their feet, flexible

## Fits vs. Gaps

## Workplace Behaviors of Candidate Behavioral Assessment

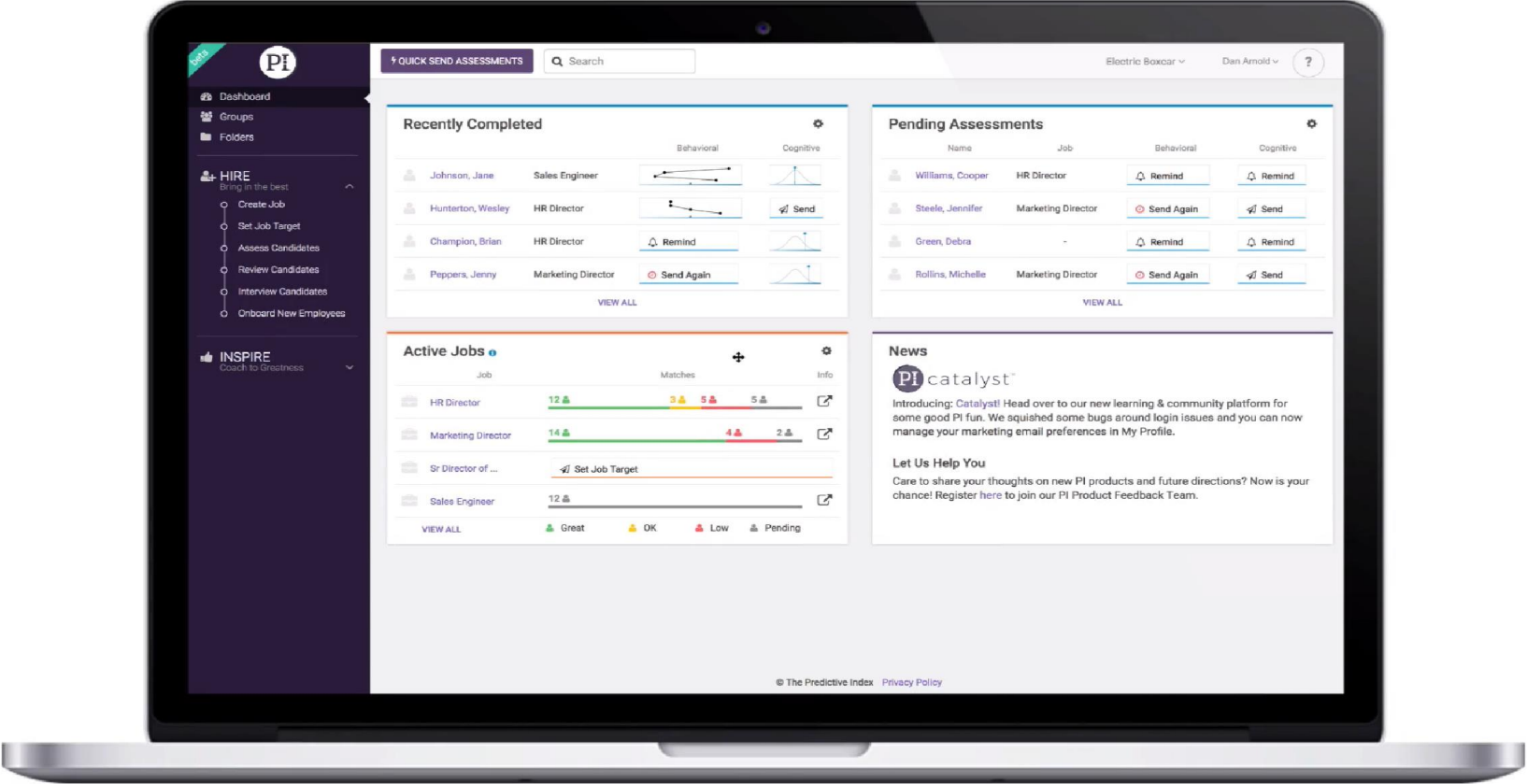
### Mary Smith



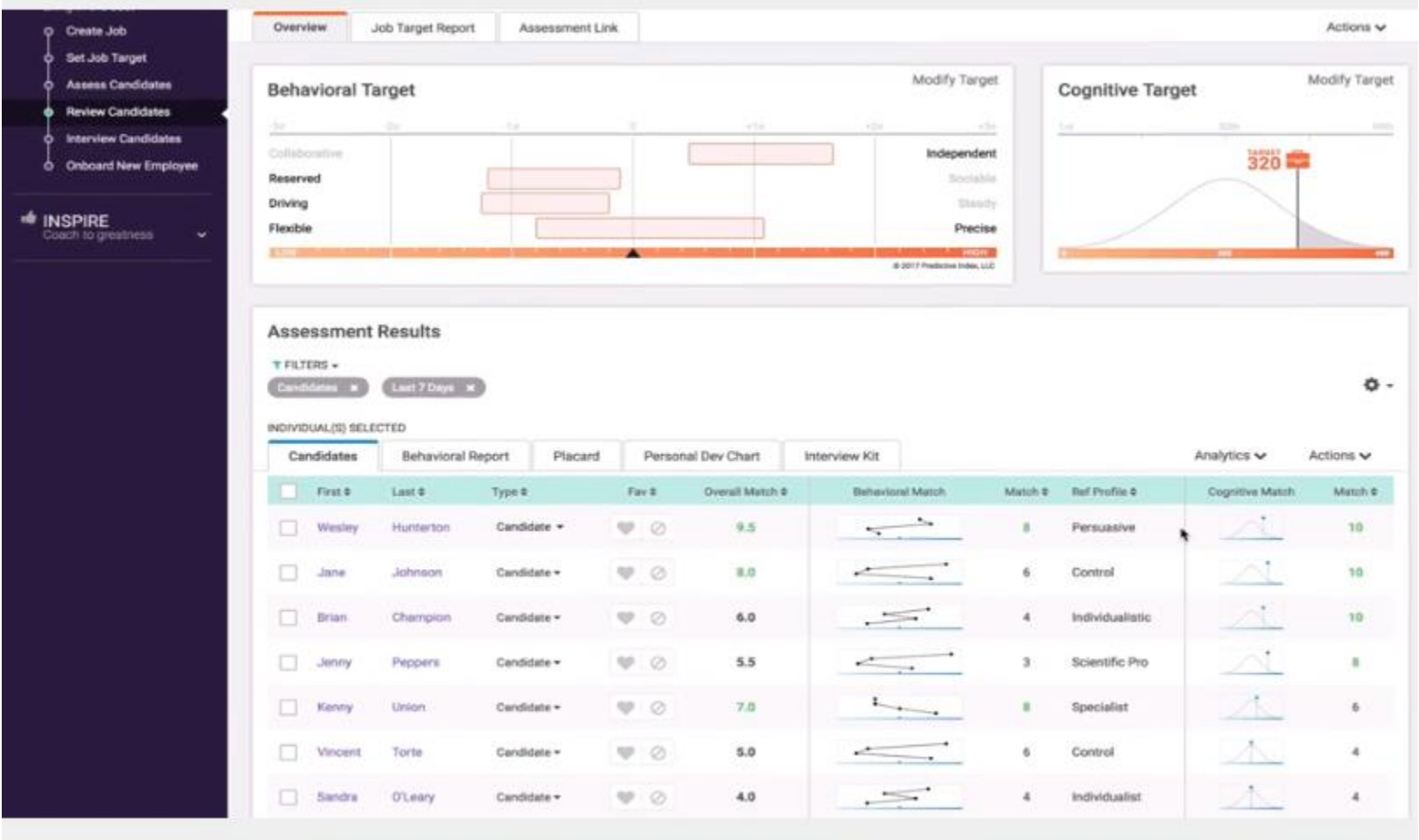
© PI Worldwide 1955 - 2015

Accommodating, comfortable with the familiar  
Reserved at first, slower to connect  
Reactive, patient, steady  
By the book, cautious, slow to change

# Predictive Index Crescendo software



# Predictive Index Crescendo software



# Scaleable Solutions for Small, Medium and Large Municipalities:

## Starting Packages include:

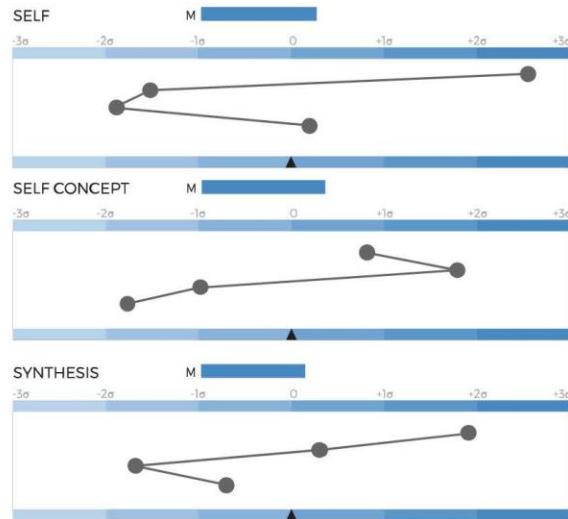
- Unlimited use for **Hiring, Succession Planning, Coaching, Team Building, Leadership Development**
- Includes **Training of 1 employee** to become a PI Analyst
- Unlimited **Support** from local Managing Principal and Shared Services team
  - Consultation
  - Software Training
  - Group Analytics
  - Interview Guides
  - Coaching Guides
  - Access and Support for Job Assessment Patterns
  - Available in 70 Languages

## Completely Customizable Packages available for all Municipalities



## DANIEL EDWARDS

The results of the Predictive Index® survey should always be reviewed by a trained Predictive Index analyst. The PI® report provides you with a brief overview of the results of the Predictive Index® and prompts you to consider many aspects of the results not contained in the overview. If you have not yet attended the Predictive Index Management Workshop™, please consult someone who has attended in order to complete the report.



## PI Report™

- The standard PI Report summarizes a person's [PI Behavioral Assessment™](#) results.
- Includes the person's Self, Self-Concept, and Synthesis behavioral patterns and summarizes how they are likely to influence, sell, and what behavioral needs their manager should fulfill.
- Ideal for employees job candidates, and managers.



PI INSIGHTS

## DANIEL EDWARDS

### DOMINANCE (A) - The need to control

VERY	MODERATELY	SOMEWHAT	SOMEWHAT	MODERATELY	VERY
<b>STRENGTHS</b> Understanding and collaborative Accepting of others' decisions Supportive management style Interested in team welfare and development		<b>CAUTIONS</b> May shy away from tough conversations May have difficulty making important decisions May be seen as too cautious or not strategic enough		<b>STRENGTHS</b> Drives change and challenges status quo Seeks to lead and have an impact Innovative, self-motivated Able to think "big picture"	
<b>SELF-COACHING TIPS</b> Shift your mindset from "I want to go along" to "I want to be fair" Stand your ground when you know you're correct Come to solutions and meetings prepared to contribute		<b>SELF-COACHING TIPS</b> Actively seek input from multiple sources Practice active listening and allow people to express their opinions or ideas Think before you speak, think of how your message will be received		<b>CAUTIONS</b> May be seen as overly aggressive May intimidate rather than motivate May have difficulty delegating authority May appear to be tough-minded and directive	

### EXTRAVERSION (B) - The need for social interaction

VERY	MODERATELY	SOMEWHAT	SOMEWHAT	MODERATELY	VERY
<b>STRENGTHS</b> Creative, problem solver Data driven, analytical Thoughtful approach to communicating information Reflective and introspective Anticipates problems		<b>CAUTIONS</b> May be slow to trust and reluctant to share until comfortable Communication may be pointed or minimalist May appear overly task-focused or remote		<b>STRENGTHS</b> Motivating, encouraging, nonjudgmental People-oriented, sociable Builds team cohesion and collaboration Thoughtful delegator	
<b>SELF-COACHING TIPS</b> Give presentations in your area of expertise Initiate conversations or schedule time to speak with others Create processes that encourage communication		<b>SELF-COACHING TIPS</b> Allow others the opportunity to contribute and influence outcomes Consider how much detail or negative information is needed when communicating Ask about potential problems or risks		<b>CAUTIONS</b> May be too systematic or overly logical May prioritize the being liked or being the focus of attention May appear overly talkative and superficial	

#### Full Pattern



**Use responsibly.** People are complex. This PI insight is a helpful starting point, but there's more to this person and pattern than what's presented here. Contact a PI expert for additional insight.



PI Insights are great, but they're no substitute for the knowledge and hands-on experience gained by attending a PI workshop. Contact your PI Consultant or visit [www.predictiveindex.com](http://www.predictiveindex.com) to learn more.

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## PI Personal Development Chart™

- Uses a person's PI Behavioral Pattern to provide a bulleted overview areas to personally develop from a workplace behavior perspective.
- Includes strengths, caution areas, and self-coaching tips to generate self-awareness.
- Ideal for employees and their managers.





# PI Personal Development Chart™

PI INSIGHTS

## DANIEL EDWARDS

DOMINANCE (A) - The need to control

VERY	MODERATELY	SOMEWHAT	SOMEWHAT	MODERATELY	VERY
<b>STRENGTHS</b>		<b>CAUTIONS</b>		<b>STRENGTHS</b>	
Understanding and understanding others		May not easily direct others		Drives change and challenges status quo	
Respecting of others' decisions		May have difficulty making decisions		Seeks to lead and have an impact	
Appropriate management style		May be seen as too directive or not strategic enough		Innovative, self-motivated	
Interested in team members and development				Able to think "big picture"	
<b>SELF-COACHING TIPS</b>					
Add your own definition of "want to go along" vs "need to do so"					
Share your ground when you know you're correct					
Come to situations with knowledge prepared to contribute					

EXTRAVERSION (B) - The need for social interaction

VERY	MODERATELY	SOMEWHAT	SOMEWHAT	MODERATELY	VERY
<b>STRENGTHS</b>		<b>CAUTIONS</b>		<b>STRENGTHS</b>	
Creative, problem solver		May be slow to trust and reluctant to share with others		Creative, problem solver	
Data driven, analytical		Communication may be perceived as impersonal		Data driven, analytical	
Thoughtful approach to communicating information		May appear overly task-focused or remote		Thoughtful approach to communicating information	
Reflective and introspective				Reflective and introspective	
Anticipates problems				Anticipates problems	
<b>SELF-COACHING TIPS</b>					
Give presentations in your area of expertise					
Initiate conversations at suitable time to speak with others					
Create processes that encourage communication					

Full Pattern

2019 January 6

Self  
Self Control  
Synthesis



Use responsibility. People will follow the person and pattern that you set.



PI Insights are great, but they are only as good as the person attending to PI insights. Consider...

Page 1 of 2

SOMEWHAT

MODERATELY

VERY

A

### STRENGTHS

- Drives change and challenges status quo
- Seeks to lead and have an impact
- Innovative, self-motivated
- Able to think "big picture"

### CAUTIONS

- May be seen as overly aggressive
- May intimidate rather than motivate
- May have difficulty delegating authority
- May appear to be tough-minded and directive

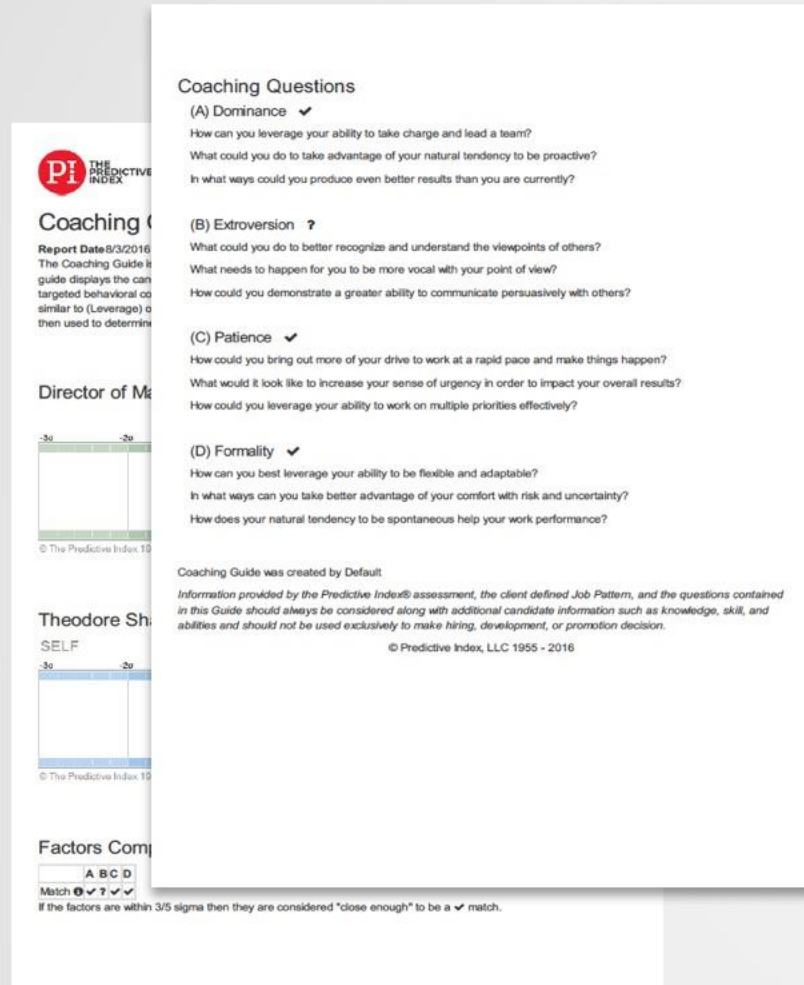
### SELF-COACHING TIPS

- Actively seek input from multiple sources
- Practice active listening and allow people to express their opinions or ideas
- Think before you speak; think of how your message will be received

Use strengths and caution areas to develop your team. All based off the PI Behavioral Assessment™.

# PI Coaching Guide™

- Uses the results of a programmatic behavioral fit-gap analysis to provide a customized list of coaching questions managers and supervisors can use when developing employees.
- Keeps the focus on the employee's behavioral style as compared to the PI Job Pattern so you can determine how best to leverage their strengths and caution their weaknesses.



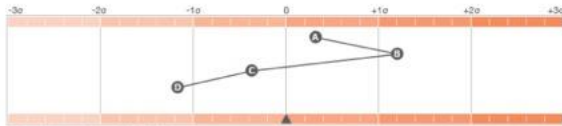


## Interview Guide: Emily Roy

Report Date 7/27/2016

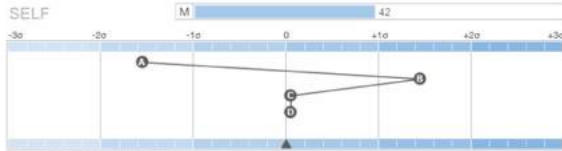
The Interview Guide is generated by comparing a candidate's PI Behavioral Assessment results and a Job Pattern for a specific position. The guide displays the candidate's Self Behavioral Pattern and position's Job Pattern graphs, Factors Comparison Table, and targeted behavioral interview questions. The Factors Comparison Table shows whether the candidate's PI result is similar to (Conform) or different from (Explore) each of the Primary Factors of the Job Pattern. This comparison is then used to determine the interview questions.

Director of Marketing



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Emily Roy



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### Factors Comparison

AB C D  
Match 0 ? ✓ ✓ ?

If the factors are within 3/5 sigma then they are considered "close enough" to be a ✓ match.

## PI Interview Guide™

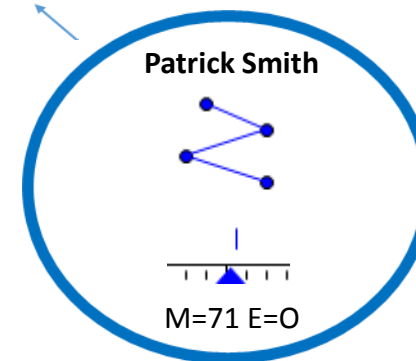
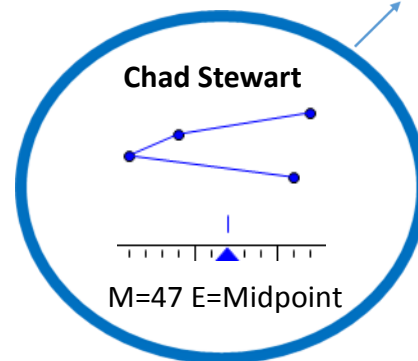
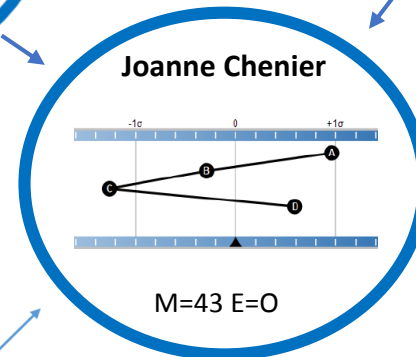
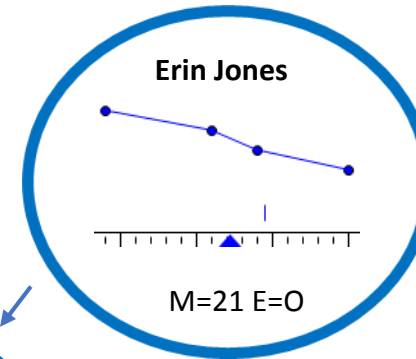
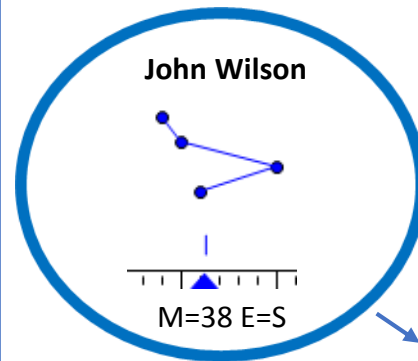
- Uses the results of a programmatic behavioral fit-gap analysis to provide a customized list of structured interview questions
- You can confirm matching behavioral traits and explore deeper into mismatching behavioral traits between a candidate's PI Behavioral Pattern and the PI Job Pattern.



# Critical Connections Map

## John will most strongly express the following behaviors:

- Unhurried and deliberate, he's stable and will do things using the established process; finds it difficult to change these systems.
- Dependable, he's consistent and needs familiar environments and coworkers to be most productive.
- Cooperative, easy-going, and agreeable in getting along with others. A focused, uncritical listener who won't 'rock the boat.'
- Methodical, steady, and even-paced; loses productivity when interrupted.
- A relatively private individual, it takes him some extra time to connect to and trust new people.



## Erin will most strongly express the following behaviors:

- Driven to protect the company against risk by thoroughly leveraging her background and strictly following 'the book.'
- Cautious; follows a well-established and proven plan to avoid making mistakes. Does the background research necessary to have proof to support her decisions before she takes action.
- Detail-oriented and accommodating; most comfortable working as part of a well-defined team
- Patient, stable, and consistent; she does things generally systematically and is not inclined to change these systems.
- Dependable, she's relatively consistent and works best in familiar environments, with familiar people.
- Works steadily at an even pace; most productive with fewer interruptions.

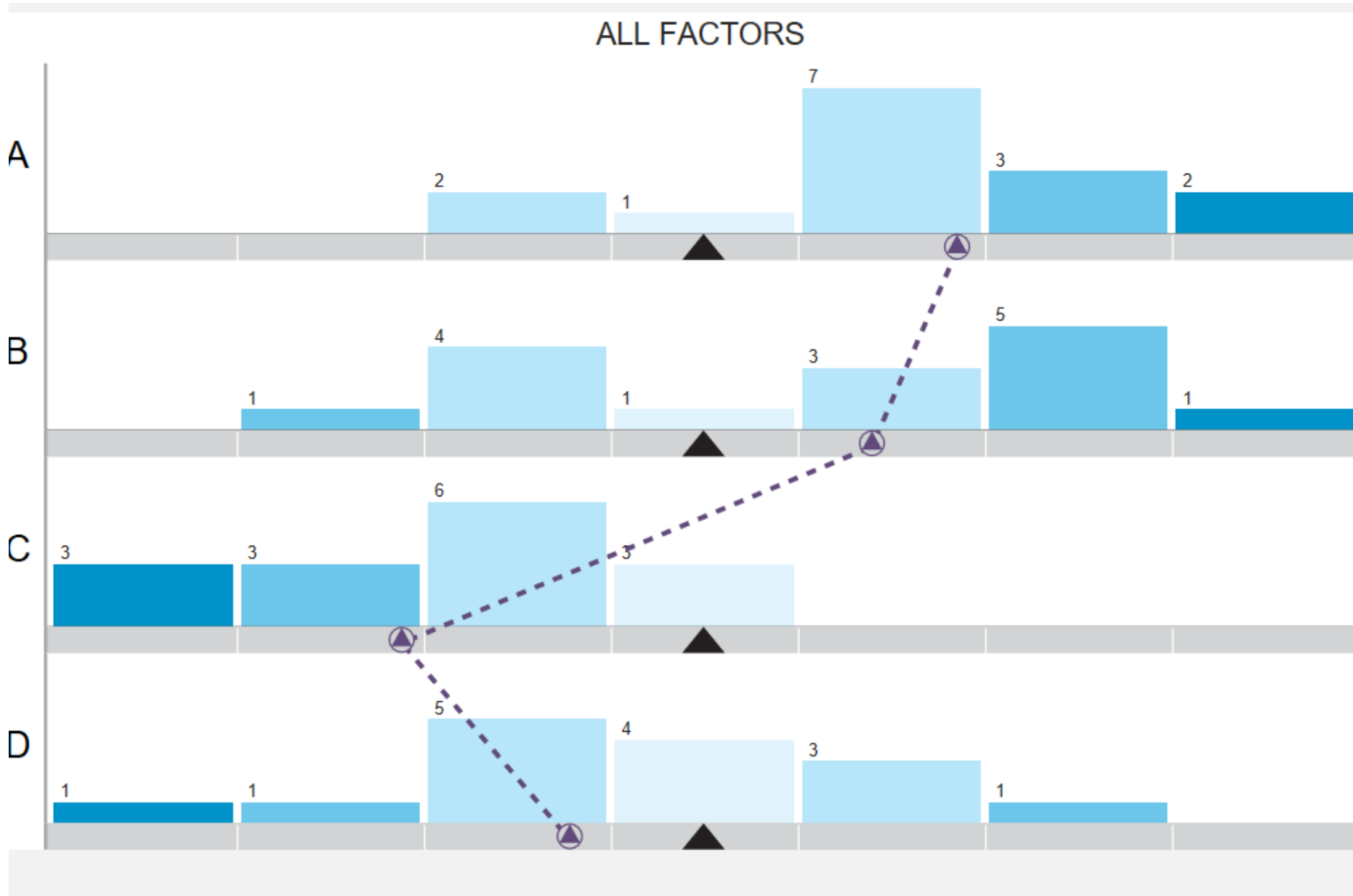
## Patrick will most strongly express the following behaviors:

- Works at a faster-than-average pace, producing results in general accordance with schedules and 'the book.'
- Detail-oriented; he typically makes and follows a plan to keep track of things and usually follows up to ensure completion.
- Focused on operational efficiencies: thinks about what needs to be done and how it can be done quickly without losing quality. Impatient with routines.
- Relatively quick in connecting to others; he's reasonably open and sharing of himself.
- Fluent, enthusiastic, and comparatively frequent in communication; a motivator who pays attention to others' points of view.
- Focused on team cohesion, dynamics, and interpersonal relations.

## Chad will most strongly express the following behaviors:

- Proactivity, assertiveness, and sense of urgency in driving to reach his goals. Openly challenges the world around him.
- Independent in putting forth his own ideas, which are often innovative and, if implemented, cause change. aggressive when challenged.
- Impatient for results, he puts pressure on himself and others for rapid implementation, and is far less productive when doing routine work.
- Careful with rules; he's precise, by the book, fast-paced, and literal in interpreting rules, schedules and results.
- Detail-oriented and thorough; he works to ensure things don't fall through the cracks, and follows up to ensure they're done properly and on time.
- Driven to achieve operational efficiencies.

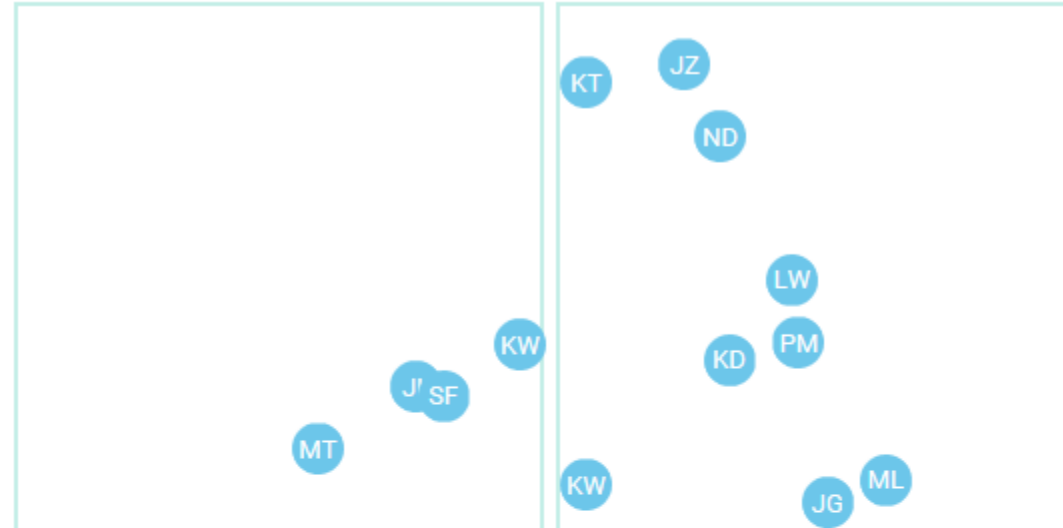
## Group Analytics: Trendview



## Team Work Styles: Decision Making

### The Controlling Decision Making Style

"Production-oriented decisions that will lead to clearly defined results." This style is about choosing options that progress the team toward tangible outcomes and payoffs. Expect this style to make choices that have clear impacts on the bottom line.



### The Initiating Decision Making Style

"Reputation-oriented decisions that will catch people's attention and turn heads." This style is about choosing options that influence people and start conversations. Expect this style to make bold choices that will make an impression on stakeholders.

### The Stabilizing Decision Making Style

"Process-oriented decisions that will improve how things are done." This style is about choosing options that improve best practices, operations, and predictability. Expect this style to rely on data and rules in their decision-making.

### The Collaborating Decision Making Style

"Group-oriented decisions that leverage the team's diversity of expertise." This style is about choosing options based on group consideration of a variety of ideas. Expect this style to rely on consensus-building and compromise to support a decision.



# A Success Story



**‘Establishing a New Process  
for Succession Planning and  
Employee Development’**



“

“The introduction of the Predictive Index Behavioural Assessment, from Predictive Success has made me more effective as a leader and gives me a great deal of confidence that the people who I recommend are strong candidates and have the competencies to be successful in the role.”

- Steve Kanellakos, City Manager, City of Ottawa







Thank You!

[www.predictivesuccess.com](http://www.predictivesuccess.com)

Come by **Booth #2** to learn more!

**CAMA 2018 Conference Special**

Receive a **FREE** trial and get your personal PI result + 4 additional staff

Join a webinar to learn more about PI Succession Planning

