

ENTRY-LEVEL SALES PROFESSIONAL JOB SIMULATION

Fenestra, Inc.

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The Entry-level Sales Professional Job Simulation offers client organizations the opportunity to put Candidates through a realistic job preview of the role and assess how they actually perform on the job. Simultaneously, Candidates experience the job firsthand and are able to determine for themselves if the job is a good fit. This results in highly effective selection decisions, increased performance on the job, increased retention, high employee satisfaction levels, and significant return on investment.



FENESTRA

A DIVISION OF SANDRA HARTOG & ASSOCIATES

Overview

This paper discusses the effectiveness of adding a highly realistic and engaging web-based assessment center process to an existing selection paradigm. Web-based assessment is ideally suited to meet the demands of Generation Y, and both organizations and their employment Candidates view it as a market differentiator. This flexible, virtually on-demand process can be used to quickly and cost-effectively select highly qualified employees from among the vast pool of new entrants to the job market, whose limited work background can be difficult to assess through interviews and tests alone. The result can be a more qualified, more satisfied workforce.

The Business Opportunity

Providing an unforgettable selection experience for Gen Y

Our client, a global financial services firm, had the goal of hiring 104 entry-level Financial Advisor Associates (junior sales professionals) in 13 national markets within 2 months. There were 3 specific challenges they needed to address:

1. A dispersed geographical territory
2. A very short timeframe
3. A recruiting population exclusively from Generation Y (college recruits)

Research into the needs of Generation Y suggests a different set of values, and therefore different needs, from other generations. In a survey conducted by CareerBuilder in 2007¹, Gen Y'ers, as compared to previous generations, expect higher pay, more flexible work environments, more frequent promotions, and more vacation time. They are highly adaptable, effective multitaskers, and competitive, both internally and with others. Finally, Gen Y'ers have grown up with and have no fear of technology. They use it in new ways and expect to have access to state-of-the-art technology on the job. These expectations require organizations to begin to reexamine some of the practices that have worked with previous generations of employees, to ensure that they are able to effectively engage and select from this new cohort.

Addressing geography and timeframe

To accommodate the dispersed geography and short timeframe, our client designed 13 regional recruiting events, or "super days." For each super day, Candidates selected to attend would be brought to a central location in each region. The 2-day events would kick off with a dinner on day one, at which Candidates were introduced to senior field management whom they would be working with if hired. Day two would consist of three 1-hour Behavioral Event Interviews (BEIs) for each Candidate designed using a proprietary competency model.

Most importantly, however, our client wanted to stand out from the crowd as an employer of choice for Gen Y. To do so, they needed to appeal to Gen Y appetites by providing their Candidates an unforgettable selection experience. They wanted something market-differentiating that gave Candidates the opportunity to shine in a manner most consistent with the needs of Gen Y. They also wanted to determine not just whether the Candidate was right for the job, but they also wanted a process that would help the Candidates to decide whether the job was the right fit for them.

¹ [CareerBuilder 2007 Survey](#)

Fenestra's Business Solution

Leveraging Fenestra's *E-valuation*™ Web-based Assessment Center

To provide the elements of engagement, excitement, and market-differentiation that our client desired, as well as to address the multitasking, technology-focused nature of Gen Y, we designed an *E-valuation*™ web-based simulation for Candidates in addition to the other super day activities.

Using *E-valuation*™, our client was able to meet their main objectives:

- **Scalability.** Assess 140 Candidates within a two-month period.
- **Distributed delivery.** Conduct assessments at 13 locations.
- **Cycle time.** Complete an assessment cycle, including Candidate scheduling, assessment, decision-making, and feedback, within a one-week period.
- **Standardization and control.** Maintain centralized control, standardization, and consistency.
- **Role fidelity.** Provide an assessment experience that closely resembles the responsibilities, challenges, and the modes of communication commonly used by the client.
- **Cost.** Deliver assessments at a fraction of the cost of a traditional assessment center.
- **Stakeholder involvement.** Provide organizational stakeholders controlled but readily available access to 'observe' activities, and to access assessment-related data and results.
- **Market differentiation.** Provide a unique, engaging, interactive hiring experience that facilitated Candidate learning about the job.

For the client, *E-valuation*™ requires few resources – a computer, a phone, and an internet connection are all that are needed. For Candidates, it is an exciting, dynamic process. It creates a technologically-based fiction that comes very close to a gaming environment – it occurs via the internet, a computer, cell phones, flash presentations, voicemail, blackberries, etc. It also provides the Candidates an opportunity to test-drive the job. As new entrants to the job market, many Gen Y'ers have little work experience to use to determine their fit with a job opportunity or for organizations to use to determine their qualifications. By putting them in the seat, both parties are able to determine whether the fit is right.

In response to the client's need, we created a 2-hour, web-based "day in the life" job simulation using Fenestra's *E-valuation*™ platform. Each Candidate was presented with a highly realistic email inbox, a calendar of scheduled and unscheduled time, account records of client and prospects, electronic folders with supporting documents, incoming and outgoing phone calls with trained assessor playing prospects and clients, and a meeting with an assessor playing their manager.

At the end of each super day, an onsite consultant led the client through an integration session. The assessment and interview results were discussed among the group, the Candidates performance was evaluated, and selection decisions were made on the basis of that performance. The result was selection of the most qualified Candidates for a given region within one day, which allowed the client to meet their tight timetable and yet provide an unforgettable experience for their Candidates. The client was then able to use the information resulting from the assessment to provide valuable behavioral feedback to hired Candidates, as well to create targeted training for the first day at work, as opposed to having to wait months for a manager to determine their strengths and development needs.

The Solution Benefits

E-valuation™ is a top-shelf web-based simulation solution that is scalable, cost-effective, highly realistic, and engaging. Our clients enjoy exceptional Return-on-Investment with **E-valuation™** and view the process as a market differentiator for recruitment, selection, and professional development. **E-valuation™** virtual assessment centers create a realistic “day in the life.” Through the simulation of a series of job-related activities in a fictitious organization, participants test drive a job while employers test drive the participant. Simulations are designed to replicate important elements of the actual job responsibilities, work environment, and culture. During the simulation, trained assessors observe and evaluate participant performance against role-specific competency models. Our assessments help our clients pinpoint the most qualified Candidates for selection and develop outstanding talent. All recommendations are documented with competency-based feedback reports. **E-valuation™** identifies strengths and developmental opportunities, which can then be fed into actionable development plans.

Benefits to this client include:

- Selection of highly qualified employees in a short timeframe
- Low cost / high impact selection process using an assessment center, the industry’s top-shelf selection method
- An exciting, dynamic process for Candidates that provides a market differentiator for the client
- The opportunity to see the Candidate actually perform, rather than simply hear them talk about what they have done or would do
- A realistic job preview for Candidates, resulting in reduced turnover due to a better understanding of the role before taking the position
- Astounding corrected predictive validities of **.85**

Benefits of **E-valuation™** Technology-enhanced Assessments:

- Delivers personalized assessment materials, enhancing realism and motivation
- Simulates today’s technology-influenced work environments
- Is competency-based and readily customizable for a wide range of competencies, positions, and simulations
- Affords central control with local implementation – can be delivered anywhere in the world that has an internet connection and a telephone line
- Provides strategic HR recommendations and customizable individual behavior-based reports
- Provides all the benefits of a traditional assessment while offering substantial cost savings

Candidate Reactions

To determine the degree to which the program addressed the needs of both Gen Y’ers and the client, we included a post-assessment survey to gauge Candidate reactions (see Table 1, next page). **Survey results indicate that:**

- The simulation experience increases Candidates’ desire for the role
- Candidates regard the simulation as a realistic job preview
- Candidates have a positive impression of companies that use a process like this one
- Candidates have better understanding of the position after the assessment than before

Table 1: Candidate Reactions

Participant Survey Questions (n=171)	Strongly Agree	Agree	Neutral	Disagree
My experiences today increased my interest in becoming a Financial Advisor	73%	25%	3%	0%
It was clear to me that the Assessment activities were related to the job of Financial Advisor	75%	23%	1%	0%
I think highly of organizations that use professionally developed selection tools such as this Assessment.	51%	43%	6%	0%
On a scale of 1-10, with 10 being the highest, please rate your level of understanding of the Financial Advisor Position	Mean (p<.01)			
Before the Simulation	7.1			
After the Simulation	8.76			

Sample comments from Candidates:

- *I realized what it takes to make contact with strangers on the phone. Coming into the assessment I was nervous about my ability to do so, mostly because of a lack of experience. But, as I got going, it actually became fun!*
- *My biggest take-away from this assessment was how important client interaction is with this job. I found it very interesting that a large part of my success as an FA depends on the interaction with the client, as well as trying to get people interested in the company. I had a lot of fun doing this because it allowed me to see what it would be like to be a financial advisor.*
- *I really enjoyed this assessment once I got the hang of it and look forward to this as a career.*
- *I discovered through this assessment that I would enjoy the daily life of an advisor. The activities of calling on leads and scheduling appointments were satisfying and I could see myself doing this for a career. There was a great sense of achievement when I scheduled a time to meet face to face with someone. I understand this career has many challenges and I look forward to engaging in those.*
- *Actually being in the role was a huge take-away. I have worked with financial advisors but nothing can prepare you for the conversations that you will be involved with in the course of a day as a real life FA.*
- *I took away from this assessment a better understanding of how to be a financial advisor. It is a completely different experience when you get to interact with mock leads and a system of organizing your day to day activities.*
- *The challenges are there and I can see the difficulty, but this only inspires me to rise above and make the most of the relationships I can have as a financial advisor.*
- *I'm going to love this job!*

Conclusion

To meet the needs of Generation Y selection Candidates, our client, a global financial services firm, implemented an **E-valuation™** web-based assessment center process during their super day recruiting events in 13 regions across the US. The process was designed to provide a market differentiator for the client and enable them to see how their Candidates perform in the role, while giving the Candidates the opportunity to experience the job firsthand and determine fit.

As a result of implementing the process, they were able to keep costs low, meet their hiring goal quickly with the best possible Candidates, and provide the Candidates with an engaging, memorable experience. The process increased Candidates' understanding of the role of Financial Advisor and increased their desire for the role, as well as giving them a positive impression of the client.



More Information

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About Fenestra, Inc.

Fenestra, Inc. is a provider of premier HR technology solutions, employing products and services to manage selection and development of employees in multiple industries, including financial services, telecommunication, manufacturing, consumer goods, marketing, retail, hospitality, and others.

Fenestra specializes in technology-enhanced assessment centers that provide scalable, relatively low-cost methods to select and develop the highest-quality employees.

Fenestra is a division of Sandra Hartog & Associates, a talent management consulting firm headquartered in New York City. Sandra Hartog & Associates and Fenestra, Inc. are certified Women-Owned Business Enterprises. For more information visit www.fenestrainc.net.

Appendices

Technical Specifications

E-evaluation™ is a fully-hosted web application designed using Microsoft's .Net platform and supported by a SQL-server database and Windows 2003 Server. The site is 128-bit encrypted with an SSL (Secure Sockets Layer) certificate. It is permission based, allowing only those with appropriate permissions to access relevant areas of the site.

Computer System Requirements

Suggested minimum hardware and software requirements to effectively use the Fenestra E-evaluation™ application:

Supported client hardware/operating systems:

PC:	Minimum Requirements
CPU	AMD/Intel 1 GHz
Operating System	Windows 2000 and Windows XP with latest critical security updates and Service Pack installed
RAM	256 MB
Mac:	
CPU	Power Mac G4, Power Macintosh G3, PowerBook G4, PowerBook G3 (except the original PowerBook G3), iMac, eMac, iBook.
Operating System	Mac OS X Jaguar
RAM	256 MB

Older, slower hardware may work but the user experience may suffer.

Supported client software:

The application is accessed using an Internet browser. The following lists supported browsers and oldest/recommended versions.

PC:	Oldest Version	Recommended Version
Firefox/Mozilla	2.0	2.0
Internet Explorer	6.0 SP1	7.0
Mac:		
Firefox	2.0	2.0
Safari	1.2	1.2

Required internet browser settings:

- First party cookies must be allowed.
- First party images must be allowed.
- Pop-up blockers, if used, must allow this site launch pop-ups.
- SSL must be allowed (**https://**).
- JavaScript enabled and the running of active scripts allowed.
- IFrames must be allowed.

Internet browser add-ons and toolbars:

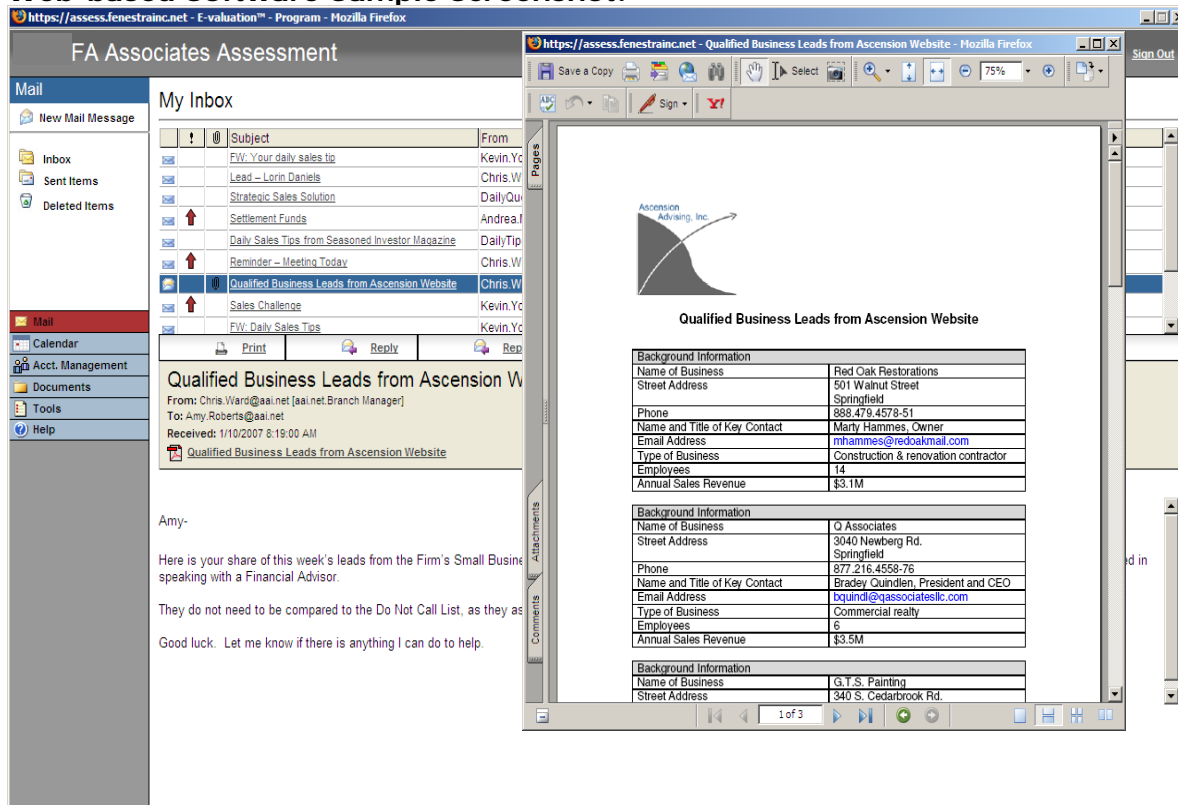
It may become necessary to disable add-ons and toolbars. The functions of these add-ons, such as pop-up blockers, blacklisting, cookie management, and the like, may compound, obscure, or be the cause of the particular problem a user is having.

Display resolution:

The application was designed to use an internet browser that is maximized (fills the entire screen) on a color display with a resolution of 1024 x 768 pixels. On higher resolution monitors the browser does not need to be maximized but the viewable pane of the browser will need to be at least 980 x 650 pixels. Though the site is visible with 8 bit (256) color it is better viewed with at least 16 bit (65,536) color.

The E-evaluation™ technology is designed to replicate a variety of work environments and the tasks and activities that are encountered on a typical work day in a variety of professions, roles, and levels. The cutting-edge technology allows the input of customizable content to create proprietary Simulation and development programs. This content is delivered to users in a multitude of roles, including program Participants, client and vendor stakeholders and administrators, and assessors/coaches/feedback providers.

Web-based Software Sample Screenshot:



FAQ's

What is an Assessment Center?

Assessment centers are considered the top-shelf solution for selecting and developing employees. They consist of activities designed to bring out behavior relevant to the most important aspects of the position or level for which the employee is being assessed. Trained assessors observe a group of employees using diagnostic processes to obtain information about the employee's abilities or potential. Traditional assessment centers take place on site at a conference facility and all role plays are held face-to-face. For additional information, click [here](#)

What are *E-valuation*™ Technology-enhanced Assessment Centers?

E-valuation™ technology-enhanced assessment centers utilize a web-based software application combined with best practices in assessment centers to provide a highly realistic simulation that parallels "a day in the life" of a busy professional, gathering information on Candidates/Participants' likelihood of success in a new role. It is scalable, cost-effective, highly realistic, and engaging, and highlights strengths and development needs that can be used to inform selection, individual development plans, and career management. It can provide more accurate information than traditional assessment centers about a participant's strengths and development needs and readiness for a new role, through a scalable, standardized process that can be implemented globally, ensuring consistently high-quality assessments for all Candidates/Participants.

What are they used for?

They are used for a variety of human resource processes, including external selection, high-potential identification, assessment of strengths and development as a prelude to development planning and/or coaching, or as a stand-alone developmental experience.

Why is a standardized process for selection and development so critical? Why is it particularly critical right now?

The cost of a wrong hire is estimated between two and four times an employee's salary.

The single leading cause of turnover in American corporations is a lack of employee/job fit.

The baby-boomer generation is leaving the workforce - increased departures will drive the need for more promotions or hires.

Companies with stronger leadership benches are four times as likely to outperform their peers in revenue growth over a 36 month period. (CLC, 2005)

What are some of the benefits of using *E-valuation*™ technology-enhanced assessment centers?

In tracking results of *E-valuation*™ technology-enhanced assessment centers, we have found

- A significant increase in the percentage of employees regarded by our clients as top-tier performers
- A significant reduction in turnover -- more than 40% -- in areas using our assessment centers

How long does it take to implement *E-valuation*™ technology-enhanced assessment centers?

The creation of the simulated organization and its challenges, the role plays, and all associated materials generally takes about 8-12 weeks. If a client already has simulation materials (e.g., that they have been using in a traditional assessment center) and wants to move to a technology-enhanced assessment center process, it can take as little as 2-3 days, providing the materials do not need to be substantially altered to fit the new paradigm. Using one of our off-the-shelf products can take as little as one day to implement.

Are there dimensions/competencies that lend themselves more or less to this type of assessment?

Organization/Prioritization, Learning Agility, Drive/Action Orientation/Motivation/Persistence, Work Standards, and phone-based selling-related competencies, such as Persuasiveness, Impact, Client/Customer Focus, and Relationship Building are all readily assessable using a technology-enhanced assessment center. The addition of face-to-face role plays can of course accommodate any competencies/exercises.

While it may seem that it could be more difficult to assess leadership skills, we believe that competencies such as influence, coaching, negotiation and collaboration are all rather readily assessed using *E-valuation*™

technology-enhanced assessment centers. This type of assessment is particularly useful for the roles of member or leader of a virtual team. We can even hold leaderless group discussions via teleconference and use web-based cameras to facilitate the face-to-face component.

Have you found any adverse impact in using the tool or any performance differences based on age, gender, or ethnicity?

We have been tracking potential differences in performance and have found that none exist for any protected groups as defined by U.S. EEOC laws. While we were initially concerned that the technology might impact users of the tool less familiar with technology, we have found that Participants/Candidates over age 40 perform as well as those under age 40. We attribute this to the intuitive nature of the technology itself, and to an orientation that outlines the use of the technology and provides clear instructions and standards for success. While the tool is not intended to assess technological comfort or savvy, most roles for which a technology-enhanced assessment center are appropriate require some degree of facility with technology on the job. As a basic understanding of the office tools we use every day is required for the role, this technology is appropriate for the assessment of that role.

What metrics do you use to track performance?

For sales roles we track production and performance levels, as well as turnover. For managerial roles, the metrics in which our clients are most interested include percentage of internal promotion, turnover of both the manager and his or her team, and the percentage of assessed Candidates who are selected for high-potential talent pools.

How is data collected and maintained on the E-valuation™ platform?

All data is instantly archived and maintained on secure servers, making it available for anytime retrieval by those with proper data-access permissions. There is no longer a need to maintain paper files of assessment materials or results data. All data can be linked into an organization's HRIS system for easy performance management integration.

How can E-valuation™ be used for development?

- Consider the following points:
 - In a few short years, the largest generation in the history of the United States - the "baby boomers" - will begin their much-anticipated exit from the workforce, leaving a massive talent void in their wake. The migration of this cohort will create a skilled labor shortage so significant that it is forcing companies to propel their talent management processes into high gear.
 - Staffing and retention represent one of the two most significant costs confronting businesses (real estate being the second).
 - The eradication of many middle-management positions over the past two decades has left many companies with a shallow talent pool from which to replace retiring leaders.
 - Organizations with the most effective talent management systems are more likely to use simulations to identify and develop Candidates.
- The key to success in identifying high potentials and developing greater bench strength in your talent pipeline is in distinguishing those with the greatest aptitude and ability to leverage development opportunities.

With E-valuation™ technology-enhanced assessment centers:

 - You can observe Participant/Candidate operating style instead of only hearing them talk about what they have done in the past or would do in the future
 - Participants can test drive" a job or new skill set
 - You can significantly increase your effectiveness at identifying extraordinary talent
 - You can significantly increase retention and keep a ready stock of high potential talent
 - You can identify individual strengths and development needs to ready your people for the future and create actionable development plans

Does it slow down the hiring process?

It is critical to both our clients and to us that we implement our assessment centers in such a way that they do not impede the hiring process. Hiring the right Candidates requires a quality, streamlined process that prevents the best Candidates from slipping away. To that end, **E-valuation™** allows for on-demand setup, requires few resources, and is designed to minimize administrative burden. Some of our assessment centers

require Candidates to complete pre-work prior to the assessment, which may add 1-3 days of Candidate preparation time to the process.

What roles/levels are technology-enhanced assessment centers most appropriate for?

We initially expected that they would be more readily accepted at the individual contributor or first-line supervisor level. However, especially for development, our clients have begun requesting that we run technology-enhanced assessment centers at senior levels, including in the C-suite.

Technology-enhanced assessment centers are most appropriate for:

- Roles that utilize some degree of technology. This could include technology as common as email, word processing software, and the internet, or as new as instant messaging, computer-based voicemail, or video-mail.
- Organizations that are "technology-forward."

Are there differences in Candidates/Participants' perceptions of fairness and accuracy that increase or lower participants' resistance to the results?

Technology-enhanced assessments have greater fidelity than traditional assessment centers due to their ability to more closely mirror the job. The process therefore lends itself to increased perceptions of fairness among Candidates/Participants over traditional assessment center. As a result, we have greater Candidate/Participant engagement beginning earlier in the hiring process, we see greater behavioral distinction between effective and ineffective Candidates for a role, and the assessment is better able to define Candidate/Participant strengths and development needs.