



CANDIDATE NAME

Executive Assessment

Conducted for:
ORGANIZATION | May 2023

CONFIDENTIAL

ORGANIZATION. | EXECUTIVE ASSESSMENT

COMPETENCY MODEL

An organization engaged HighMatch to provide an assessment of the individuals who have been identified as Real Estate Finance Director candidates. The following behavioral competencies have been identified as critical for performance:

Decision Quality	<ul style="list-style-type: none"> • Makes sound decisions, even in the absence of complete information. • Relies on a mixture of analysis, wisdom, experience, and judgment when making decisions. • Considers all relevant factors and uses appropriate decision-making criteria and principles. • Recognizes when a quick 80% solution will suffice.
Interpersonal Savvy	<ul style="list-style-type: none"> • Relates comfortably with people across levels, functions, culture, and geography. • Acts with diplomacy and tact. • Is able to read through the veneer and identify what is not being said. • Picks up on interpersonal and group dynamics.
Communicates Effectively	<ul style="list-style-type: none"> • Is effective in a variety of communication settings: one-on-one, small and large groups, or among diverse styles and position levels. • Has the difficult conversation in a direct manner. • Adjusts to fit the audience and the message. • Provides timely and helpful information to others across the organization. • Encourages the open expression of diverse ideas and opinions.
Drives Results	<ul style="list-style-type: none"> • Has a strong bottom-line orientation. • Persists in accomplishing objectives despite obstacles and setbacks. • Has a track record of exceeding goals successfully. • Pushes self and helps others achieve results via demonstrating a sense of urgency.
Demonstrates Self-Awareness	<ul style="list-style-type: none"> • Reflects on activities and impact on others. • Proactively seeks feedback without being defensive.



Manages Complexity

- Is open to criticism and talking about shortcomings.
- Admits mistakes and gains insight from experiences.
- Knows strengths, weaknesses, opportunities, and limits.
- Asks the right questions to accurately analyze situations.
- Acquires data from multiple and diverse sources when solving problems.
- Uncovers root causes to difficult problems.
- Evaluates pros and cons, risks and benefits of different solution options.

EXECUTIVE SUMMARY

Using findings from the interview and psychometric assessments, we score the competencies deemed most critical for the role on a 9-point scale ranging from “Developing” (1-3) to “Effective” (4-6) to “Role Model” (7-9). It is important to remember that scoring as a “Role Model” in every area would be very unlikely, and a score in that range is truly exceptional. We would anticipate someone who scores in the “Effective” range is functioning effectively with respect to that competency, although there may still be room for growth.

Competency	Rating	Developing	Effective	Role Model
Decision Quality	8	[Bar chart showing score 8: 3 units in Developing, 3 units in Effective, 2 units in Role Model]		
Interpersonal Savvy	5	[Bar chart showing score 5: 3 units in Developing, 2 units in Effective]		
Communicates Effectively	3	[Bar chart showing score 3: 3 units in Developing]		
Drives Results	6	[Bar chart showing score 6: 3 units in Developing, 3 units in Effective]		
Demonstrates Self-Awareness	3	[Bar chart showing score 3: 3 units in Developing]		
Manages Complexity	7	[Bar chart showing score 7: 3 units in Developing, 3 units in Effective, 1 unit in Role Model]		

Key Findings from Our Interview

The candidate is a highly analytical leader who has demonstrated the ability to drive success within organizations by balancing interpersonal skills with creativity. A lifelong learner, the candidate seeks to find opportunities to develop and grow their skillset. They are amicable to feedback and should take to coaching well. What particularly impressed us about the candidate is their approach to decision making and managing complexity. They walked us through a number of complex situations and described how they systematically distill information and come to a prudent decision. This is all done with alacrity and regular communication to key stakeholders.

Key Findings from the Online Assessments

Personality testing shows the candidate to be a diplomatic and warm individual who demonstrates empathy and understanding for others. They are highly competitive and will demonstrate the drive to push the organization forward. Further, they are resilient and composed. The candidate was identified as not being prone to many common leadership derailing behaviors. Meaning, under stress they are likely to be seen as even-keeled and predictable. Lastly, the candidate scored exceptionally well across measures of cognitive ability. They will discern information easily, derive adequate solutions, and be seen as a highly critical thinker.

Opportunities for Growth

The candidate possesses all of the predispositions to be successful within this role. In the areas where they may struggle, the candidate has previously been provided feedback and employed developmental strategies. The candidate could stand to improve their communication style, especially when dealing with executives. The candidate needs to focus on the recipient of the information more than what they want to communicate. The candidate could also improve their self-awareness and take on a more active role in identifying their developmental needs.

Conclusion and Recommendation

Based on our interaction with the candidate and the scores from the online assessments, the candidate is **RECOMMENDED WITH CAVEATS** for the position of Real Estate Finance Director. The caveats are based on the willingness from leadership to work with the candidate on the areas of development listed below. With proper coaching, we feel the candidate will be successful in this role.

Marc Prine, PhD
Industrial/Organizational Psychologist

INTEVIEW SUMMARY**Personal/Career History**

With a background in engineering, the candidate has built a career throughout the home building industry. They enjoy the problem-solving aspects of the industry and that their day-to-day activities are never the same. We saw a strong alignment between the corporate cultures that the candidate has enjoyed working in and this organization. The candidate likes to be in situations where employees are empowered to make decisions and are not subject to excessive micromanagement. They like it when an organization values employees and people are encouraged to push themselves in the workplace. The candidate had been part of a wide scale reduction in force recently and has been doing consulting work for many of their previous employers. The candidate has a track record of being successful through balancing various stakeholder groups and prudent decision making.

Future Goals/Ambitions

Having been steeped in growing their own consulting practice, the candidate was not actively looking for a new role. Long-term, the candidate is looking for continued challenges and excitement in their career. They like the “grind” of the home building industry and the variety this particular role will provide. They are interested in roles where the projects entail a high pace and lead to high impact outcomes. The candidate exhibited high intellectual curiosity and openness to learning new things. They are interested in learning more from a highly process-oriented, results-driven organization.

Interview Observations/Insights

The candidate presents themselves as a highly thoughtful and detailed individual. They provided comprehensive responses to the questions. At times they were very detailed, verbose, and difficult to follow. They would likely benefit from direct coaching in succinct, direct communication. The candidate presented an honest appraisal of their approach and experiences. Many of their accounts detailing their leadership style aligned with the psychometric testing.

COMPETENCY DETAILS

Competency	Rating	Developing	Effective	Role Model
Decision Quality	8			

Observations

- The candidate is an exceptional decision-maker. In the examples provided, they collected an array of data, had in-depth conversations with key stakeholders, and leveraged personal experiences to develop a comprehensive approach. They mentioned a disdain for “analysis paralysis” and highlighted a sense of urgency within their decisions.
- Aligned with their examples, general reasoning testing shows the candidate to be skilled at making complex decisions. They possess a tendency to contextualize problems correctly in terms of the short- and long-term benefits of their solution, then solve them effectively. Their personality shows an attention to detail and meticulous nature.

Competency	Rating	Developing	Effective	Role Model
Interpersonal Savvy	5			

Observations

- While the personality testing shows the candidate to be less effective in building relationships quickly, they demonstrated an ability to insert themselves into a situation and properly manage key stakeholders. Knowing they may need to be involved at some point, the candidate goes out of their way to build relationships with various government officials. While this approach is beneficial, they may not have the luxury when working across the organization’s entire portfolio.
- Being a subject matter expert within the industry, the candidate has shown interpersonally savvy by learning the motivations of various groups and pulling on the proper levers to garner an outcome that is suitable for all those involved. They demonstrate empathy to make others feel heard and finds ways to relate with each individual while still moving towards a positive outcome.

Competency	Rating	Developing	Effective	Role Model
Communicates Effectively	3			

Observations

- The biggest piece of critical feedback the candidate has received throughout their career has been in their ability to communicate properly to various groups of people, especially high-level executives. The candidate took that feedback seriously and has purposefully sought to develop these skills via various training courses focused on written and verbal communication. As mentioned, at times during our conversation, we found the candidate to be a bit verbose and difficult to follow.
- In the examples provided, the candidate demonstrated an ability to appropriately tailor their messaging to each recipient group. They thoughtfully consider the motivation of each stakeholder group and ensure their questions are proactively addressed.

Competency	Rating	Developing	Effective	Role Model
Drives Results	6			

Observations

- The candidate is an ambitious individual who is confident in their abilities to be successful. They are competitive and look for ways to drive results within their organization. The candidate talked about how they relish opportunities to be part of difficult negotiations and find ways to add value to their organization. They take their responsibilities very seriously and talked about seeing their investors' money as their own.
- While some ambitious people push themselves, and others, through sheer force of will, the candidate seeks to work smarter and not necessarily harder. The candidate talked through a number of instances where they saw better ways to be successful and the establishment of various protocols leading to enhanced outcomes in less time. The candidate enjoys problem solving and will be able to think critically to determine the best approach to achieve team success.

Competency	Rating	Developing	Effective	Role Model
Demonstrates Self-Awareness	3			

Observations

- When asked how they are perceived by others, the candidate was slow to respond. Similarly, when asked where they may struggle coming into the role at this organization, they were not able to identify areas that will push them outside of their comfort zone. The majority of the candidate’s development seems to be a result of direct feedback. The personality assessment shows the candidate to be less self-aware than other leaders.
- While the candidate may require more direct feedback to identify areas of development, when provided with feedback they are likely to quickly employ strategies to mediate performance. They are likely to understand feedback and value others who are willing to engage them in the conversation. They said they are thankful for those who take the time to help them improve. The candidate’s competitive nature will likely lead to criticism being mediated quickly.

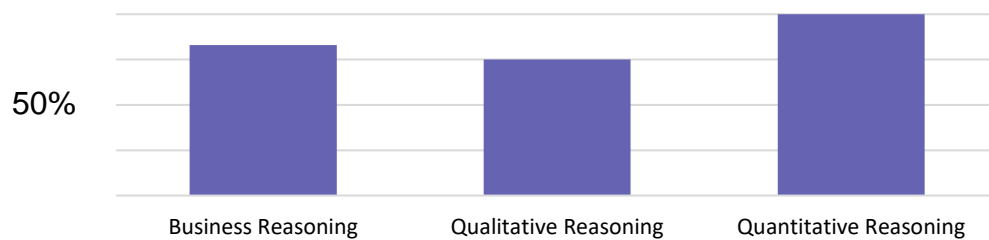
Competency	Rating	Developing	Effective	Role Model
Manages Complexity	7			

Observations

- Navigating complex situations is not only one of the candidate’s greatest skills, but it is an area in which they feel most energized. The candidate employs a methodical process to simplify complexities and identify various opportunities to move forward. They are willing to ask questions and push back on the status quo if there is a better solution. Their consulting mindset shines in complex situations.
- General reasoning tests align with their examples and show the candidate will likely seek out the root cause of problems in order to create meaning out of messy information. They will understand the pertinent information and make sound decisions. The only reason they are not rated higher in this area is they tend to build very strong relationships and are likely to be trusting of others. They will validate what people tell them but will not be skeptical initially.

REASONING ABILITY ANALYSIS

This section evaluates critical thinking ability and decision making. The overall Business Reasoning score is made up of two scales: Qualitative Reasoning and Quantitative Reasoning, both critical elements of professional and leadership success. The midline on the graph below signifies the population average. Anything above is desirable.



The results from the candidate's cognitive ability test suggest a very high level of general reasoning; they demonstrate a superior cognitive function to operate within almost all occupations.

The candidate's score suggests that they are a critical thinker and tends to do the following with a high level of skill and consistency:

- Understand multiple levels of information and how these pieces can interact.
- Balance logic and intuition to understand and solve problems. Can usually distinguish between what is known and what is inferred.
- Excel with application and execution of mathematical principles compared to others.
- Work well with concepts and make accurate inferences, even with incomplete information.

DEVELOPMENT OPPORTUNITIES**Key Leadership Challenges and Development Considerations**

Below is a summary of selected areas that may be targeted for development:

- The candidate has gotten a lot of feedback on their need to think about how they present to executives. The candidate is very detail oriented and planful and loves to solve problems. Use this as a way to frame the task at hand. Make them think through the presentation the same way they would problem solve. Lean into their social perceptiveness to identify what each person will care to hear about. With proper coaching, they will be able to effectively develop in this area.
- Most of the candidate's areas of development have been due to criticism from others. Given the independent nature of the role they are seeking, they may not be privileged to regular feedback. When you are not closely monitoring their day-to-day activities, force them to be critical of themselves. Ask how various activities went and how they could have been better. Leverage their process orientation and push the candidate to develop their own feedback loops.
- As somebody who has personality tendencies that are a bit more introverted, they may not consistently have the social drive required employ the relationship building skills they have developed. When the candidate comes on board, encourage them to go on a "listening tour" having conversations with a lot of the various internal stakeholders they may be interacting with during various projects. Find other internal projects where the candidate may be able to demonstrate their subject matter expertise to build credibility and earn the trust of others.
- With a background in engineering, the candidate mentioned being comfortable with, but not an expert in financial modeling. They noted being able to use tools they have been exposed to and wanting to learn more. Just note that some initial training on this organization's tools will be needed. They mentioned even being supported by a financial analyst as a potential need.
- The candidate is a leader who enjoys, and is effective in, developing talent within the organization. While they say they are happy to give up this responsibility, we would recommend making it very clear what opportunities they will have to coach others. Provide as realistic of a preview you can to ensure the candidate understands exactly what the role entails in the short, medium, and long-term.

APPENDIX 1: USING THIS REPORT

This report is a summary of the findings of an individual assessment conducted by HighMatch and can aid you in making selection, placement, promotional, or training and development decisions. It is designed to highlight some of the personality traits, key motivators, and abilities of the individual described and provide assistance with their development.

This report provides an Executive Summary of the findings and recommendations (ranging on a 5-point scale from Not Recommended to Highly Recommended). Following the Executive Summary is a detailed description of the participant's performance in each aspect of the assessment, as well as coaching and onboarding recommendations.

Because this information is of a personal nature, it is important that the following be considered:

- Because of the nature of this information and the dangers of misuse, this report is a confidential document and should be stored securely. Its contents should be restricted to as few people as possible and only to those who have direct responsibility for decision making.
- This assessment report is but one piece of data to be used when understanding this person. We recommend that you integrate this report with information from other sources (e.g., from interviews, employment references, work experience, etc.) when making decisions about this person.
- This information will be dated. People change, grow, and develop over time, sometimes in unpredictable ways. If more than one year has elapsed since the date of this report, its findings must be carefully weighed and modified by new evidence and information.
- Organizations change too, and these changes could well affect the recommendations of this report. Assessments that are clearly out of date or pertain to individuals who are not employed by your organization should be destroyed.
- Only the individual described, his/her supervisor(s), and those directly concerned with his/her development should have access to this report.
- This document is not intended to become a permanent part of this individual's personnel file.
- Because everyone has strengths and development areas, special caution must be exercised to view this report as a whole. Be careful not to overemphasize specific statements, but rather consider this person's overall suitability for a particular position in your organizational environment.

To ensure that this information is used in the most helpful and ethical manner, this page should remain attached to this document at all times.

Appendix 2: Assessment Process

Phase One: Position Needs Analysis

The Executive Assessment Process begins with an initial needs assessment of the leadership role via a telephonic interview. Conducted with stakeholders familiar with the position, the discussion helps us understand the key deliverables and priorities of the role, as well as identify behavioral and personality characteristics believed to be critical to high performance in the role, success within the culture, and fit with the specific leadership team.

Phase Two: Administration of Assessment Instruments

The candidates are contacted and sent web links to take several online psychometric assessments. The chosen battery includes statistically validated instruments measuring work-related personality, leadership style, and critical thinking skills. The results from these instruments are interpreted only by a trained assessment consultant with expertise in leadership and executive assessment.

Phase Three: Interview and Strategic Discussion

Following the online assessments, an in-depth interview is conducted with the participant. The interview is conducted face-to-face or by videoconference. Questions focus on the participant's background, real world experiences, motivations, and individual perspectives as indicators of their leadership abilities. The focus is on the specific behaviors, motivators, and priorities that substantiate those abilities. The interview process is designed to:

- 1) Identify and describe behaviors in past accomplishments
- 2) Focus on self-knowledge/self-awareness
- 3) Clarify strengths and leadership development needs
- 4) Target inquiries based on the information obtained earlier through the assessment tools.

Phase Four: Written Report and Key Decision Maker Debrief

Following the interview, the HighMatch assessor creates an executive summary report. The report is sent to the hiring team typically within 2-3 days following the interview and is then discussed during a debrief call with the team. The debrief call provides an in-depth discussion of the findings and offers decision makers an opportunity to seek clarification on certain results.

Phase Five: Individual Feedback Session

Once any decision has been made (e.g. hiring, investment, development) and all participants have been notified, the HighMatch assessor will create a detailed Executive Assessment Report, and schedule an individual feedback session with the selected internal or external participant to help them understand the assessment results and how to use them for developmental purposes. The same process may apply to the non-selected internal candidate (if applicable). Non-selected external candidates will NOT receive feedback.

Appendix 3: Assessment Instruments

The following psychometric testing instruments were utilized for this assessment:

Hogan Personality Inventory	This inventory measures one's propensity to engage in 41 specific sets of behaviors. It is important to remember these results suggest a preferred way of operating. If the situation calls for a different approach, it may be difficult to abandon a strong behavioral tendency. Being called upon routinely to engage in behaviors that are not a natural fit may lead to eventual burnout and turnover.
Hogan Development Survey	The Hogan Development Survey (HDS) measures eleven patterns of interpersonal behavior that tend to appear when a person is stressed, tired, or distracted. Although these tendencies may limit peoples' careers, they are often unaware of them. The HDS highlights these tendencies so they can be managed.
Hogan Business Reasoning Inventory:	Evaluates critical thinking ability and decision-making. The overall general reasoning score is made up of subscales that focus on mathematical reasoning, logical problem-solving abilities, verbal reasoning and ability to make inferences, all critical elements of professional and leadership success.