



## ***Job Analysis Report***

for

### **Credit Union Customer Service**

**Monday, August 12, 2002**

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**LMI's Center for Effective Organizations**

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## Job Match Pattern Description For Credit Union Customer Service

The shaded boxes on each scale represent the job match pattern for this job. The Employee Description describes the ideal employee relative to each scale. The Scale Description provides insight into the meaning of each scale generally, and will help you understand the ideal employee relative to a high or low score on each scale.

### Thinking Style

**Learning Index**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who can train within normal limits and yet may occasionally require closer attention when learning new material.

Low	Scale Description – Learning Index	High
<p>Repetition and hands-on learning can be effective in training</p> <p>Achieves best through learning that is specific to the job</p>	<p>This is an index of expected learning, reasoning and problem solving potential; a composite of the scores for Verbal Skill, Verbal Reasoning, Numerical Ability, &amp; Numeric Reasoning.</p> <p>The ability to respond efficiently in a training situation can typically be found in an individual with a <b>high Learning Index</b>. Such an individual can communicate complex ideas through data, words or both in an effective manner.</p> <p>At the <b>low end</b>, an individual may be most comfortable with responsibilities that emphasize concrete thinking and routine tasks.</p>	<p>Strong capacity to adapt quickly</p> <p>Typically finds it easy to learn the requirements of a new job situation</p>

## Thinking Style (con't)

**Verbal Skill**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who communicate within normal expectations and are also comfortable communicating the more complex aspects of their routine functions.

Low	Scale Description – Verbal skill	High
<p>Can be slow and deliberate in communicating ideas</p> <p>Most communications are concrete and straightforward</p>	<p>This is a measure of verbal skill through vocabulary.</p> <p><b>High Verbal Skill</b> is often associated with confidence in vocabulary. However, the individual may occasionally “talk over the heads” of others.</p> <p><b>Lower scorers</b> do not demonstrate a strong command of vocabulary and may tend to utilize vague or inaccurate expressions when they communicate. Such an individual might not ask for clarification when information is not understood.</p>	<p>Capable of precise communication, even under strict time constraints</p> <p>Competent in making analyses involving written and verbal data</p>

**Verbal Reasoning**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who interpret routine communications effectively with an ability to analyze more complex verbal information.

Low	Scale Description - Verbal Reasoning	High
<p>May require more time to assimilate new information of a verbal or written nature</p> <p>May be less proficient in information gathering techniques</p>	<p>Relates to using words as a basis in reasoning and problem solving.</p> <p><b>High Verbal Reasoning</b> suggests a strong potential for understanding verbal information both quickly and accurately. May find concrete and routine problem solving tedious.</p> <p>A <b>low scorer</b> may overlook inferences in verbal or written data. This individual may be most comfortable with responsibilities that do not require abstract reasoning skills when working with words.</p>	<p>Strong information gathering ability</p> <p>Assimilates verbal information rapidly</p> <p>Can abstract conclusions from verbal information more proficiently than others</p>

## Thinking Style (con't)

**Numerical Ability** 1 2 3 4 5 6 7 8 9 10

**Employee Description:** Employees who rarely need to make calculations with numerical information while performing their work routines.

Low	Scale Description - Numerical Ability	High
<p>Using mathematics can be challenging</p> <p>Figuring numerical problems may require the use of a calculator</p>	<p>This is a measure of numeric calculation ability; basically, of how well an individual works with numbers.</p> <p><b>High Numerical Ability</b> is often associated with being confident when calculating numerical data. Often, decisions can be made quickly, based on such data, without having to refer to calculation tools since the work is often done mentally.</p> <p><b>Lower scorers</b> will often rely on calculators or other aids to solve numerical problems. They may be most comfortable with positions that do not routinely utilize numerical calculations.</p>	<p>Quick in mentally determining mathematical solutions to problems</p> <p>Demonstrates a sound understanding of basic mathematical processes</p>

**Numeric Reasoning** 1 2 3 4 5 6 7 8 9 10

**Employee Description:** Employees who are rarely required to analyze mathematical data or make decisions based on numerical information and who do not usually utilize graphs or charts to explain such data.

Low	Scale Description - Numerical Reasoning	High
<p>May overlook the implications derived from a set of numerical data</p> <p>May be comfortable using simple calculations for problem solving</p>	<p>This scale measures an individual's ability to use numbers as a basis in reasoning and analysis.</p> <p>Utilization of statistical inference is common among those with <b>high Numerical Reasoning</b> scores. The ability to visualize trends in a set of numerical data is likely to occur in such individuals.</p> <p><b>Lower scorers</b> may be most comfortable with positions that rarely utilize numerical forms of data for reaching decisions.</p>	<p>Demonstrates little difficulty in assimilating new information of a numerical nature</p> <p>Can process numerical data to reach conclusions or understand inferences</p>

## Occupational Interests

**Enterprising** 1 2 3 4 5 6 7 8 9 10

**Employee Description:** Employees who are not driven to compete with others to earn profit or take advantage of opportunities for personal gain.

Low	Scale Description - Enterprising	High
<p>Generally disinterested in many areas of entrepreneurship and sales</p> <p>May not always enjoy the give and take of deal making and negotiating</p>	<p><b>Enterprising</b> indicates an <b>interest in occupations</b> where one uses persuasiveness and enjoys presenting plans. The entrepreneurial aspects of sales and business are often desirable for such individuals.</p> <p>Being motivated by many of the <b>Enterprising</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Persuading others Sales activities Profit-oriented activities</p>

**Financial/Administrative** 1 2 3 4 5 6 7 8 9 10

**Employee Description:** Employees who are highly motivated by administrative duties or financial information processing.

Low	Scale Description - Financial / Administrative	High
<p>Generally disinterested in some areas of administration</p> <p>May not always enjoy work that requires attention to details or other organized routines</p>	<p><b>Financial/Administrative</b> indicates <b>interest in occupations</b> that work with financial data, business systems, administrative procedures, etc.</p> <p>Being motivated by many of the <b>Financial/Administrative</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Financial Tasks Administration Organization Office Work Business Procedures</p>

## Occupational Interests (con't)

**People Service**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who are motivated by helping others, yet also possess less service-oriented interests.

Low	Scale Description - People Service	High
<p>Generally disinterested in some areas of social service</p> <p>May not always enjoy work that requires social service or human resources</p>	<p>The <b>People Service</b> scale indicates <b>interest in occupations</b> that help people and are concerned with the welfare of others.</p> <p>Being motivated by many of the <b>People Service</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Facilitating those in need Helping others Community service Working with people</p>

**Technical**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who are motivated by scientific and computer-related endeavors, yet also possess less technical interests.

Low	Scale Description - Technical	High
<p>Generally disinterested in some areas of the technical fields</p> <p>May not always enjoy work that requires analytical tasks or working with data</p>	<p>The <b>Technical</b> scale indicates <b>interest in occupations</b> that center on scientific and technical activities, research and intellectual skills.</p> <p>Being motivated by many of the <b>Technical</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Scientific study Research methods Working with data</p>

## Occupational Interests (con't)

**Mechanical**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who are motivated by mechanical situations, yet also possess less mechanical interests.

Low	Scale Description - Mechanical	High
<p>Generally disinterested in some areas of the mechanical/ industrial fields</p> <p>May not always enjoy work that requires hands-on tasks or working with equipment</p>	<p>The <b>Mechanical</b> scale indicates <b>interest in occupations</b> that involve hands-on work with tools, equipment and machinery.</p> <p>Being motivated by many of the <b>Mechanical</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Being physical Working with things Working with machines, tools or equipment</p>

**Creative**    1   2   3   4   5   6   7   8   9   10

**Employee Description:** Employees who are somewhat motivated by innovation and creative tasks, yet whose primary motivation may lie in other interests.

Low	Scale Description - Creative	High
<p>Generally disinterested in some areas of the creative fields</p> <p>May not always enjoy work that requires creative tasks or working with artistic / expressive media</p>	<p>The <b>Creative</b> scale indicates <b>interest in occupations</b> where one may be imaginative, original and aesthetic.</p> <p>Being motivated by many of the <b>Creative</b> occupations listed in the interest inventory is characteristic of an individual with a <b>high score on this scale.</b></p>	<p>Characterized by interest in:</p> <p>Aesthetics Creative expression Innovation</p>

## Behavioral Scales

**Energy Level**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who are most effective in a relaxed atmosphere with the opportunity to focus on one task at a time.

Low	Scale Description – Energy Level	High
Patient	<p><b>Energy Level</b> demonstrates a tendency toward restlessness, activity and drive. This scale deals with issues such as efficiency and time utilization.</p> <p>The potential for risk-taking, restlessness and seeking excitement and challenge can be found in an individual with a <b>high Energy Level</b>.</p> <p>At the <b>low end</b>, an individual provides the patience and calmness fundamental to particular kinds of work.</p>	Self starter
Good with methodical processes		Multi-tasker
Good task focus		Self-motivated

**Assertiveness**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who are most effective when they can accept the leadership of others and respond to a structured environment.

Low	Scale Description - Assertiveness	High
Willing to accept a leader	<p><b>Assertiveness</b> is identifiable as a measure of generalized confidence. It is often associated with expressed influence.</p> <p><b>High assertiveness</b> is often found with a focus on achievement and a seeking of leadership and the control of situations.</p> <p><b>Lower scores</b> suggest a minimal need to control the actions of others. Such an individual may provide co-workers with an example of a compliant follower.</p>	Comfortable with self expression and leadership
Diplomatic		Competitive
Low need to control others		Achievement oriented

## Behavioral Scales (con't)

**Sociability**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who are motivated by the opportunity to work with others. They often seek opportunities for teamwork.

Low	Scale Description - Sociability	High
<p>Avoids small talk</p> <p>Keeps to one's self</p> <p>Will not become frustrated by a lack of social contact</p>	<p><b>Sociability</b> is a strong measure of social presence. It directly relates to self-control and flexibility. This trait can be seen as more reliant upon interpersonal contacts than most other traits.</p> <p><b>High Sociability</b> signifies a desire to work closely with others and accomplish goals in a group setting.</p> <p>A <b>low scorer</b> tends to focus on achieving goals through individual efforts and can work over longer periods without considerable interpersonal contact. This individual tends to "stick to business" and often will not demonstrate a need to collaborate on projects.</p>	<p>Conversational</p> <p>People oriented</p> <p>Comfortable working in a group setting</p>

**Manageability**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who respond enthusiastically to a highly structured environment that requires one to work under the direct supervision of management.

Low	Scale Description - Manageability	High
<p>Can be cautious with authority figures</p> <p>Tends to defend point of view</p> <p>Willing to question when not in agreement</p>	<p><b>Manageability</b> suggests a strong relationship to social responsibility and stability. It is a measure of how one reacts to the limits placed by authority and the acceptance of conventional thinking.</p> <p><b>High Manageability</b> is often associated with being comfortable with authority and rules, taking duties seriously, conformity, and taking pride in being self-disciplined.</p> <p><b>Lower scores</b> reflect a working style that emphasizes individualized thinking and a willingness to question inefficient practices. This kind of person is not usually willing to blindly do the accepted thing.</p>	<p>Cooperative and agreeable</p> <p>Works within the rules</p> <p>Comfortable with authority</p>

## Behavioral Scales (con't)

**Attitude**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who consistently maintain their positive expression and trust easily. They tend to have a relaxed social style.

Low	Scale Description - Attitude	High
<p>Sometimes skeptical</p> <p>Can be critical of others</p> <p>Often vigilant</p>	<p><b>Attitude</b> measures the degree one is willing to demonstrate trust toward others. It relates to the tendency to suspend judgments about others.</p> <p>A positive and accepting outlook regarding people is common among those with <b>high Attitude</b> scores.</p> <p><b>Lower scorers</b> may be good at expressing dissatisfaction with situations that do not appear acceptable to them.</p>	<p>Optimistic</p> <p>Trusting</p> <p>Relaxed social style</p>

**Decisiveness**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who are consistently responsive in a timely fashion and who can make quick decisions under pressure.

Low	Scale Description - Decisiveness	High
<p>Not typically impulsive</p> <p>Prefers a Methodical approach</p> <p>Analyzes before making a decision.</p>	<p><b>Decisiveness</b> has been found to reflect how confident one is in accepting the risk of making a decision in a timely fashion.</p> <p>A <b>high decisiveness</b> scorer will tend to make a decision with the information currently available so that processes do not become too mired in deliberation.</p> <p>A <b>low decisiveness</b> scorer may require input and support from superiors or teammates when making a decision. In certain environments, this individual's need for analysis and collaboration leads to ultimate progress.</p>	<p>Moves quickly when making decisions</p> <p>Accepts risk in most situations</p>

## Behavioral Scales (con't)

**Accommodating**    1   2   3   4   5   6   7   8   9   10

**Employee Description:**    Employees who enjoy working with others, even in stressful conditions.

Low	Scale Description - Accommodating	High
<p>Can seem too firm</p> <p>May be disagreeable on occasion</p> <p>Will not typically follow the group, just to get along with others</p>	<p><b>Accommodating</b> is often associated with a concern for group accountability. A willingness to consider the needs of all group members is typical.</p> <p>The <b>high Accommodating</b> person holds societal norms and self-control as important guides for behavior.</p> <p>On the other hand, the <b>low Accommodating</b> individual is able to maintain a measure of doubt that protects him or her from being taken advantage of, when necessary.</p>	<p>Cooperative</p> <p>Harmonious</p> <p>Likeable</p>

**Independence**    1   2   3   4   5   6   7   8   9   10

**Employee Description:**    Employees who work best under direct supervision, with little need for independent action.

Low	Scale Description - Independence	High
<p>May seek support</p> <p>Cautious or reserved</p> <p>Accepts supervision easily</p>	<p><b>Independence</b> defines the manner in which an individual prefers to be directed by others, and one's potential to accomplish tasks with minimal supervision.</p> <p>A <b>highly independent</b> person is usually willing to accomplish goals in his or her own way.</p> <p>One with <b>low Independence</b> will prefer to turn to others to guide his or her performance. This can lead to an expression of predictability and prudence, which can be a potential asset.</p>	<p>Adventurous</p> <p>Slow to follow</p> <p>Likes to set own direction</p>

## Behavioral Scales (con't)

**Objective Judgment**

1	2	3	4	5	6	7	8	9	10
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**Employee Description:** Employees who utilize data in order to make deliberate decisions based on the logical application of objectivity and practicality.

Low	Scale Description - Objective Judgment	High
<p>Subjective</p> <p>Will follow a hunch</p> <p>Not overly bound by systematic thinking</p>	<p>The <b>Objective Judgment</b> scale reflects a willingness to make use of cognition versus intuition. This is often referred to as the balance between "head" and "gut."</p> <p><b>High scores</b> describe an individual who will tend to trust observable facts in his or her thinking process, whereas,</p> <p><b>Low Objective Judgment</b> describes a person who is willing to follow a hunch or listen to his or her intuition before acting.</p>	<p>Comfortable with a logical approach</p> <p>Unemotional thinking</p>

## Credit Union Customer Service

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### Thinking Style

Learning Index	1	2	3	4	5	6	7	8	9	10
Verbal Skill	1	2	3	4	5	6	7	8	9	10
Verbal Reasoning	1	2	3	4	5	6	7	8	9	10
Numerical Ability	1	2	3	4	5	6	7	8	9	10
Numeric Reasoning	1	2	3	4	5	6	7	8	9	10

### Occupational Interests

Enterprising	1	2	3	4	5	6	7	8	9	10
Financial/Administrative	1	2	3	4	5	6	7	8	9	10
People Service	1	2	3	4	5	6	7	8	9	10
Technical	1	2	3	4	5	6	7	8	9	10
Mechanical	1	2	3	4	5	6	7	8	9	10
Creative	1	2	3	4	5	6	7	8	9	10

### Behavioral Traits

Energy Level	1	2	3	4	5	6	7	8	9	10
Assertiveness	1	2	3	4	5	6	7	8	9	10
Sociability	1	2	3	4	5	6	7	8	9	10
Manageability	1	2	3	4	5	6	7	8	9	10
Attitude	1	2	3	4	5	6	7	8	9	10
Decisiveness	1	2	3	4	5	6	7	8	9	10
Accommodating	1	2	3	4	5	6	7	8	9	10
Independence	1	2	3	4	5	6	7	8	9	10
Objective Judgment	1	2	3	4	5	6	7	8	9	10