

# Using skills testing and behavioral assessments for Recruiting and Evaluating Telephone Consultants

## CUSTOMER OVERVIEW

Mission Federal Credit Union operates as a federally chartered credit union. The company offers checking and savings, money market, and retirement accounts; online and mobile banking and others. The company was founded in 1961 and is headquartered in San Diego, California.

## BUSINESS CHALLENGES

Mission Federal Credit Union wanted to predict the tenure and the performance of the best employees and identify candidates that can perform once they are on the job.

## SOLUTION

Mission Federal identifies their measures for hiring success by using two scores. The first is a 90-day review score and the second is an annual performance review score. Mission Federal has also identified the 180 day as a key indicator of a successful hire.

They decided to use skills assessments to measure and predict employee performance. The skills testing review process included all available employee related information on those that were hired in the last 12 months and the existing employees from the same time period.

**Thirty employees and candidates participated as test subjects:**

-  Existing Employees
-  Incoming Candidates

**Existing employees were tested in an effort to establish a baseline of "success"**

**All test subjects were given the same amount of time to complete both assessments.**

The skills test (named SkillsScore) was created with original content agreed between the client and client success manager. This test was labeled Telephone Consultant Test and had 25 questions from subjects like:

-  **Inbound Call Center Simulations**
-  **Customer Service**
-  **Bank Teller Skills**

The behavioral assessment (named FitScore) was centered on the critical behaviors deemed important for performing the job successfully, such as extraversion, stability, reliability and autonomy. This behavioral assessment also included a **Critical Thinking and Reasoning** portion.

## How does Credit Union evaluate the candidates' scores?






There are a couple of metrics that Mission Federal Credit Union (MFCU) uses to measure success at the company. MFCU performs a 90-day and annual review of all employees. Each employee is given a score based on a 1-4 scale. Their threshold is a 2, with anything below that requiring disciplinary action. MFCU also deems a "successful hire" as someone who stays longer than six months. If an employee has a satisfactory 90 day review score, they typically make it to the annual review.

Annual reviews follow the same procedures and the core competencies measured remain the same. The difference in annual reviews is MFCU focuses on performance within the role. Such performance measures are broken down into:

-  **Member Experience Survey**
-  **Agent Availability**
-  **Dependability**
-  **Operation or Quality Control**

## RESULTS

In essence, while the behavioral assessment and the skills test evaluate core competencies and performance measures without negatively impacting tenure, the cognitive score is not predictive of any of the performance measures being used.

-  **Higher FitScore has strong correlation with annual performance review**
-  **Higher SkillsScore has a strong correlation with 90 day performance review**
-  **Turnover for this group was 36% for the period.**
-  **89% of those that separated voluntarily before the 180 day mark, had cognitive scores higher than 80% and lower FitScores.**
-  **Those separating averaged 119 days.**

This tells us that the skills test is best at predicting the 90 day performance and the behavioral assessment is best at predicting the annual performance review.

## CONCLUSION

Eleserv has helped identify candidates that can perform once they are on the job. All test subjects scored at least a 70% on the Telephone Consultant Test. During the time period that we captured data, only one person (4%) moved on from the company due to performance related reasons. The results support the notion that people who score well can jump into the role without additional training. MFCU understands that it takes a certain type of person to be successful in a call center environment, and the Behavioral assessment is able to highlight the traits that meet the desired profile. Candidates and existing employees that had a high "Fit Score" on the behavioral assessment typically had strong 90-day reviews and annual reviews when applicable.

## ABOUT Eleserv Talent Solutions

**Since 2016, Eleserv Talent Solutions has been helping organizations across the country improve their hiring processes and understand how best to develop their employees. Companies like Lerch Bates, Formica, and Home Instead trust Eleserv Talent Solutions to help them reduce hiring costs and improve productivity of their workforce by focusing on identifying individuals who are the right fit for their organization and using that information to develop them to full productivity. The tools that we use to do this are job relevant and backed by years of science. Eleserv has a full suite of solutions designed to help organizations identify skill fit and Behavioral Fit as well as leadership development and engagement/culture. In addition, the Eleserv Design platform allows organizations to customize assessments to their specifications.**