



BRIEFINGS FOR THE INFORMED PROFESSIONAL

65th HR Network Breakfast Seminar

Using Assessments To Drive Better Outcomes In Hiring And Development

#TFCTalks

@FiveOClockClub

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THE FIVE O'CLOCK CLUB®



BRIEFINGS FOR THE INFORMED PROFESSIONAL

Friday, March 27th, 2015

Breakfast Seminar

CUNY GRADUATE CENTER

365 Fifth Avenue

7:30 A.M. - 8:00 A.M.

Registration & continental breakfast

8:00 A.M. - 9:30 A.M.

Presentation and Comments from the Audience

SHRM RECERTIFICATION

The Five O'Clock Club is Recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CP or SHRM-SCP.

CLASS: 15-1740

1.5 PDCS

**HRCI RECERTIFICATION GENERAL
CREDIT HOURS AWARDED: 1.5**

PROGRAM: 241086

To receive recertification credit, please log-in to www.hrci.org, and click "My Recertification"



ABOUT THE FIVE O'CLOCK CLUB

We're an HR department's greatest ally, delivering brilliant outplacement solutions. And we're an executive's secret weapon, targeting solutions for more impactful leadership. We help your people find their footing faster using our time-tested and research-based method; it just works.

OUTPLACEMENT

Our proven method, based on 25 years of ongoing research, continually evolves as the world around us shifts and changes. Our certified coaches help candidates utilize our materials – books, podcasts, webinars, online resources – personalizing the experience, bringing the job seekers' techniques up to date, and supporting them throughout the entire process.

EXECUTIVE COACHING

Whether you have a team of 5 or 500, we can help your superstars develop, polish, and expand their leadership skills. From the strategic to the practical, we guide and advise your most promising leaders one-on-one, so you'll not only have a more effective leadership team, you'll have transformed careers. That makes your job a little easier and your company a whole lot stronger.

WHERE YOUR PROFESSIONAL SUCCESS GETS PERSONAL

Think of us for Outplacement Services, Leadership Development, Cross-Cultural Training, Team Building, Onboarding, Spouse Relocation help, Retirement Planning, and a host of other services.

Welcome to the 65th HR Network Breakfast Seminar

We will explore the role of assessments in recruiting and developing talent with the focus on achieving better business outcomes.

TODAY'S BREAKFAST TOPIC

Using Assessments to Drive Better Outcomes In Hiring And Development

You will hear the perspectives of three seasoned HR executives. Collectively, the panelists have experience and expertise across several of today's leading assessment tools - from NBI to Hogan to Predictive Index and beyond.

Our panelists will discuss how and when assessments are effective and when they could be misleading, confusing and counter-productive. They will share their personal experiences and the assessments they use for promoting self-awareness, driving positive behavioral change, encouraging collaboration, and building efficient work teams.

They will also discuss the extent to which assessments have helped them to achieve remarkable gains in hiring and retention metrics.

In short, you will learn the good, the bad, and the useful in this jam-packed 90 minute seminar.

*Don't Forget To Live
Tweet Your Questions
To #TFCTalks*

THE HOST



DARREN KIMBALL

Chief Executive Officer of The Five O'Clock Club

Prior to joining the company, Darren enjoyed a 20-year career on Wall Street. Darren spent 10 years as a top-ranked analyst by Institutional Investor Magazine and was twice the Wall Street Journal's top sector stock picker. He has appeared on CNBC, CNN, and Bloomberg TV to discuss his views. Darren holds a B.S. in Economics with magna cum laude honors from The Wharton School of the University of Pennsylvania and has been a chartered financial analyst (CFA) since 1994.

THE MODERATOR



ROBIN SCHLETTER

Five O'Clock Club Certified Coach, Executive Coach and Director, Business Development

Robin Schletter is both an Executive and Career Coach. She develops a partnership with her clients through open and honest dialogue with an emphasis on results. Robin helps her clients to move from where they are to where they want to be, overcome persistent obstacles and performance challenges, identify what is critical to them and what will bring results.

She began her career with a focus on the design, development and implementation of training programs for a diverse group of companies. At Home Box Office (HBO) she spearheaded the landmark affiliate training function that created the first nationwide system to improve sales and customer service for over 150,000 customer contact personnel.

Robin is a graduate of Columbia University's Advanced Executive Coaching Certification Program. She is Certified to Administer both The Birkman Method and the NBI: Thinking Preferences Assessment. She holds a Certificate in Training and Development from New York University. Her Master's Degree in Psychology is from the New School for Social Research in New York City and she holds a Bachelor of Arts Degree in Psychology and Sociology, summa cum laude, from Long Island University.

Robin is a member of the ICF (International Coach Federation) and the ACEC (Association of Corporate Executive Coaches).

THE PANELISTS



SHAVIT BAR-NAHUM
SVP, Leadership Development Executive at Merrill Lynch Wealth Management / Bank of America

Shavit is responsible for the talent strategy, leader development, organizational design, performance management, assessment design, and executive coaching. Shavit also drives cultural transformation work and regularly designs and delivers leadership and change management workshops.

Shavit joined Bank of America in early 2007 as a Global Markets Learning and Leadership Development Consultant, looking at strategic business initiatives as they relate to talent management, performance, and leadership development. In 2008, Shavit became the Leadership Development Executive supporting U.S. Trust, focusing on executive coaching and organization effectiveness, strategic talent management, and

enhancing sales performance. In addition, she led the talent assessment and organizational design process for Global Wealth Management during the Merrill Lynch transition. From 2010 to 2014, Shavit supported GWIM Technology and Operations and Technology Infrastructure.

Prior to joining Bank of America, Shavit worked at Personnel Decisions International as a Senior Consultant and the Director of Leadership Development. At PDI, Shavit partnered with global organizations to evaluate pivotal talent constraints and create integrated systems for measurement, development and talent management processes to enhance bench and align current and future leaders with organizational vision.



ARTURO PAGÁN
Deputy Director and Chief HR Strategic Partner at United Nations Population Fund (UNFPA)

Arturo has worked at UNFPA for over 10 years as Human Resources Specialist, then Chief of the Learning and Career Management Branch before becoming the Deputy Director. As Deputy Director, Arturo leads the Strategic Partnering Branch overseeing a group of seven HR business partners who provide strategic HR support in each of the Region they cover.

Before joining UNFPA, Arturo worked as a Human Resources Officer with the International Fund for Agricultural Development (IFAD) in Rome, Italy and as a Senior Program Officer with the Institute for International Education in Washington, DC supporting USAID-funded development initiatives.

He is currently a board member of AHRMIO, the Association of HR Managers in International Organizations, and is a member of SHRM and ATD (formerly ASTD).

THE PANELISTS



CARLA VILAR

*VP, Human Resources,
Worldwide at Orion
Holdings, a division of
Interpublic Group*

Carla joined Orion in 2012. Six months later, her role was expanded to include all offices outside the U.S. Shortly thereafter, she was promoted to Vice President. Since joining the organization, the company has more than doubled in both size and billings. During her tenure, she has revolutionized the way the company recruits, hires and develops talent based on behavioral assessments. In addition, she has developed the global sales training program, created an employee diversity group within Orion, formalized an employee exchange program and implemented a global communications strategy.

Prior to joining Orion, Carla served as Director of Human Resources for two digital agencies experiencing exponential growth. One of them, agency.com was recognized as the first interactive agency in the U.S., and for its time was the largest digital agency in the world. It was

purchased by Omnicom and later incorporated into TBWA.

Carla's success is defined by her ability to project a company's growth path and match incoming talent appropriately. She has an innate ability to perceive an employee's strengths, and use them to both the company's and the employees' advantage. Earlier in her career, Carla worked as both a recruiter and an associate producer in broadcast production. Her job at Orion combines the skills of both worlds.

CONTACT INFORMATION FOR THE PANELISTS

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UPCOMING SEMINARS

All HR Network Breakfasts are held at The Graduate Center at 365 Fifth Avenue

Fri, June 19, 2015

Fri, September 18, 2015

Fri, January 29, 2016

7:30 A.M. - 8:00 A.M.

Registration & continental breakfast

8:00 A.M. - 9:30 A.M.

Program

Follow us on Twitter and Instagram @FiveOClockClub and like us on Facebook!



See Five O'Clock Club Coaching in Action

Attend a Five O'Clock Club outplacement coaching session in person. You'll see the difference, and understand why more companies choose The Five O'Clock Club as their outplacement provider.

CONTACT LINSEY ODRE TO SCHEDULE AN OBSERVATION:

212.286.4500 | linsey@fiveoclockclub.com

FROM HR EXECs

"The Five O'Clock Club program is far more effective than conventional outplacement. Excellent materials, effective coaching and nano-second responsiveness combine to get people focused on the central tasks of the job search. Selecting The Five O'Clock Club Outplacement Program was one of my best decisions this year."

**SR. VICE PRESIDENT, HUMAN RESOURCES,
MANUFACTURING COMPANY**

"Job hunters reported on where they were in their searches and what they had accomplished the previous week. The overall environment fosters sharing and mutual learning."

HEAD OF HUMAN RESOURCES (MAJOR LAW FIRM)

FROM PAST MEMBERS

"I dragged myself to my first meeting, totally demoralized. Ten weeks later, I chose from among job offers and started a new life. Bless you!"

SENIOR EDITOR, NOT-FOR-PROFIT

"The Five O'Clock Club made me a better candidate. They taught me to go beyond my comfort zone. I didn't like self-promotion. I didn't like putting myself out there. But you know, you really do need to make that next phone call."

MANAGER, PROFESSIONAL SERVICES

Navigating the Assessment Maze

Carla Vilar-Rojas

Orion Holdings

VP, HR Director Worldwide

The Five O'Clock Club

March 27, 2015

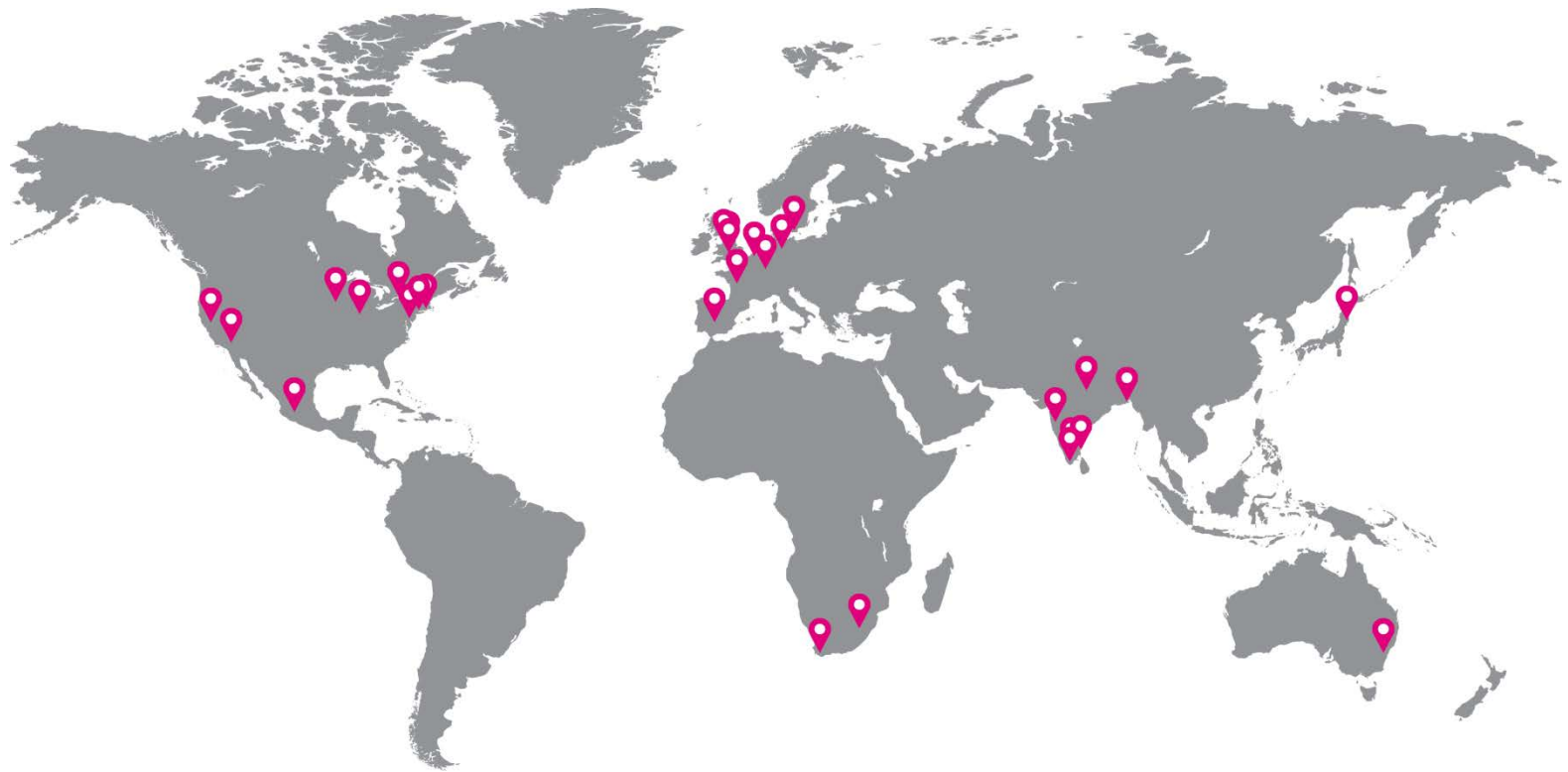
Who We Are



Orion Holdings, a division of IPG Mediabrands, is a global solutions-oriented collection of media companies that support and/or complement what traditional advertising agencies offer to clients.

Where We Do It

With over 800 employees in 28 offices around the world, our agencies have the global scale needed to meet our client's needs whether they be on the hyper-local level or all the way to worldwide coverage – Orion is there.



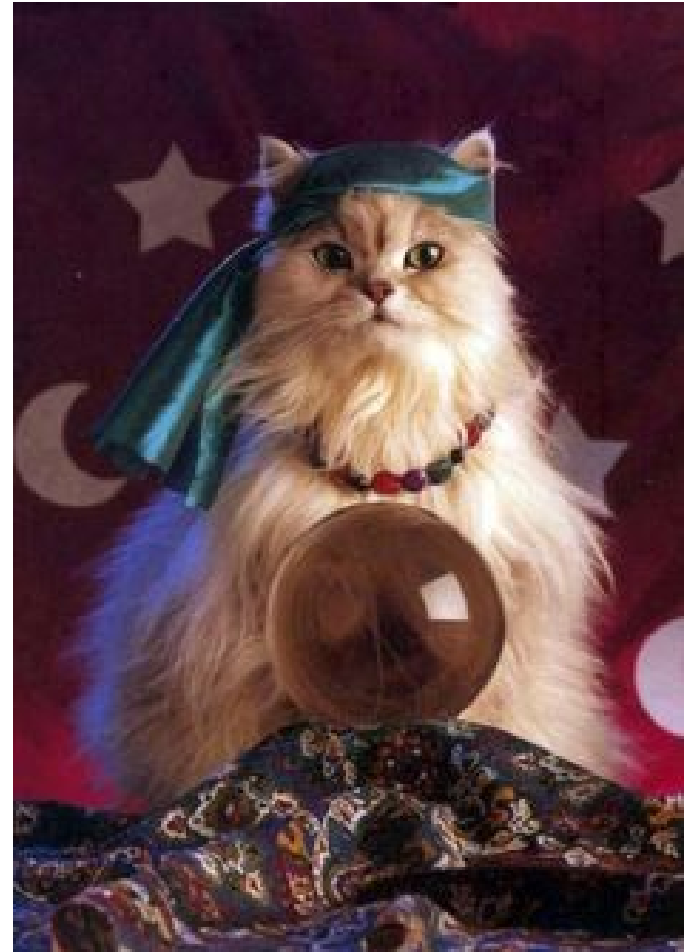
Our Locations: *New York (HQ), Amsterdam, Bangalore, Birmingham, Cape Town, Cochin, Chennai, Chicago, Copenhagen, Delhi, Frankfurt, Hamburg, Johannesburg, Kolkata, London, Los Angeles, Madrid, Manchester, Mexico City, Minneapolis, Mumbai, Norwalk, Paris, Philadelphia, San Francisco, Sydney, Tokyo, Toronto*



- Hard to fill position
- Difficulty identifying requirements/experience
- Reduce turnover

PI Worldwide

- Global (70 languages + Braille)
- Quick & easy assessments
- Based in Science
- Broadly applicable



Focus Areas – Hire to Retire



Talent Acquisition

Level I


- Appearance
- Manners
- Interests
- Goals
- Expressiveness

Level II

- Knowledge
- Skills
- Training
- Experience
- Education
- Credentials

Level III

- Attitudes & beliefs
- Self motivation
- Stability & persistence
- Maturity & judgment
- Temperament/behavior patterns

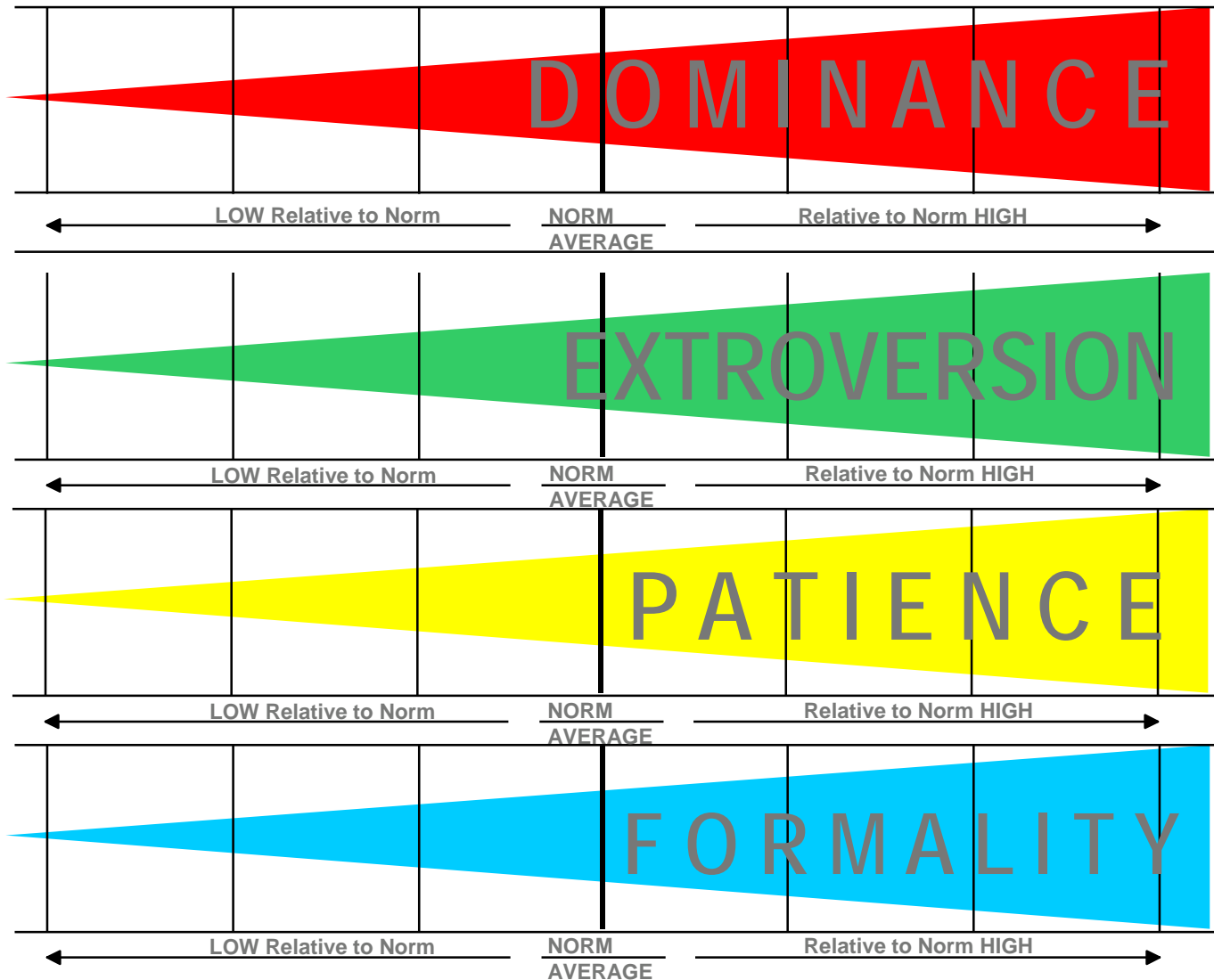


Most managers make their hiring decisions based on Levels I & II...

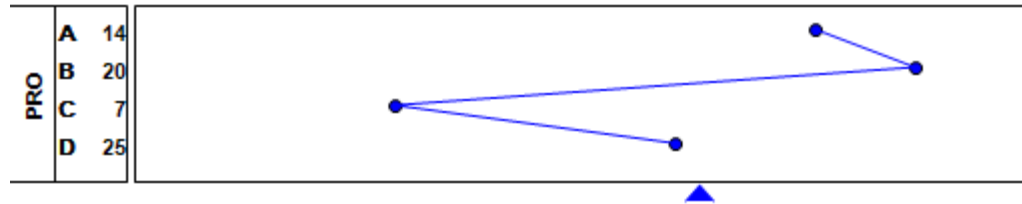
...The decision to fire is often based on Level III



A Data Driven Approach to Talent Management



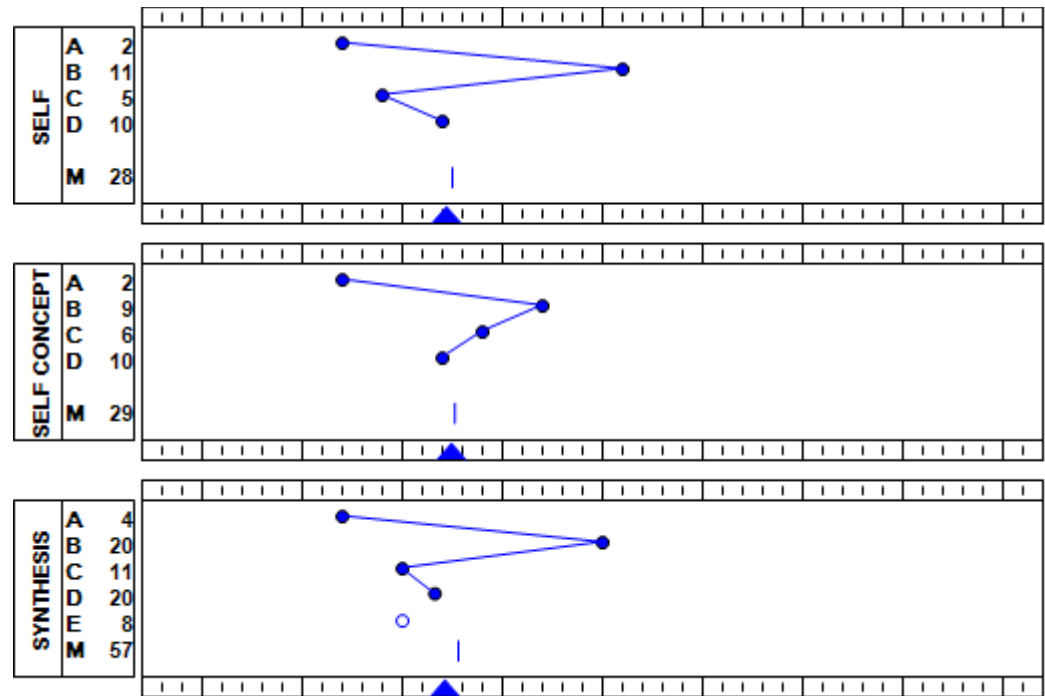
Predictive Index® (PRO®)



- Job analytic tool
- Evaluates a job's behavioral requirements
- Derived from stakeholder input
- Enables fit/gap analysis

Predictive Index® (PI®)

- Behavioral assessment
- Measures individual's motivating needs and behavioral drives
- Takes less than 10 minutes to complete
- Scientifically-validated, reliable and EEOC compliant for selection



Attrition Results YOY

2012 Total Attrition = 28.6%

2013 Total Attrition = 24.5%

2014 Total Attrition = 17.4%





Using assessments to support HR processes: a **UNFPA** Case Study

Arturo Pagán, Deputy Director
Chief Strategic Partner
UN Population Fund (UNFPA)

The Five O'Clock Club – 27 March 2015



About UNFPA

UNFPA: A UN agency that works in more than 150 countries and territories that are home to the vast majority of the world's people.

Its mission: to ensure that every pregnancy is wanted, every childbirth is safe and every young person's potential is fulfilled.



Use of Assessments @ UNFPA

- Use a variety of assessments in our learning and development programmes
- Goals:
 - Improving team interaction and communication
 - Enhancing greater self awareness
 - Career development
 - Leadership and succession planning

Assessments

- **Belbin Team Roles** (www.belbin.com)
- **The Neethling Brain Instruments – NBI**
(<http://www.nbiprofile.com>)
- **Myers Briggs Type Indicator – MBTI**
(<http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/>)
- **Occupational Personality Questionnaire – OPQ (Saville & Holdsworth Ltd - SHL)**
(http://ceb.shl.com/uk/solutions/products/docs/OPQ_Fact_Sheet_CEB%20v1.pdf)
- **And others!**

Improving Team Interaction

- **Belbin and NBI Assessments**
 - Used as part of Teambuilding Retreats
 - Provide neutral vocabulary – allow for “fun”
 - Understanding of what may cause **CONFLICT**
 - Assessment of Team Profile –
 - What do we have
 - What do we need
 - What roles we should play and when!
 - Orientation Programme for New Staff



Self Awareness & Career Development

- How do you contribute as an individual?
- What do you contribute to a team?
- How do you think? communicate?
- What is important to you?
- What motivates you?
- What do you need to be careful with?
- What are your derailers?
- Good fit for jobs?



Leadership and Succession



- **Leadership Pool Assessment Centres**
 - Psychometrics (OPQ, Reasoning/Numerical)
 - 360 Feedback/Behavioural Interviews
 - Role plays/simulations
- **Leadership Development (LEAD UNFPA)**
 - MBTI / NBI Coaching
 - Identification of leadership style
- **ID candidates Resident Coordinator AC**

Positive Feedback

- **Very popular with staff**
- **Can strengthen feedback when used as part of larger programme or assessment exercise**
- **Perception more objective than subjective**
- **Easy to administer / gather reports**
- **Facilitate communication**

Challenges

- Cultural / Linguistic / bias “perceptions”
- Resistance to use them as “stand-alone” tools
- Assessments can either complement or conflict
- Outside of teams using Belbin, we don’t look at overall/comparable data as organization
- Require certification to use properly

Thanks!

