



## ASSESSMENT REFERRAL INFORMATION

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**In order to start the process for assessment and development plan, please complete the following information:**

*Hiring Executive:*

*Phone for Preliminary Report:*

*Name of person to be assessed:*

*Email address of person being assessed:*

- Executive External Candidate*  
 *Internal Promotion Candidate*  
 *High Potential/Succession Planning Purposes*

*Current or Prospective Position:*

*Date Needed:*

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**1. Please indicate in rank order the TOP FIVE characteristics which are most desirable for effective performance in the new or next assignment.**

*Communication Skills*

*Independent*

*Ease with Numbers*

*Able to form long-term relationships*

*Sales ability*

*Socially mature*

*Managerial Ability*

*Generate sound first impressions*

*Planning and organizing*

*Tenacity and commitment to tasks*

*Socially participative*

*Self-assured and confident*

*Reliable and dependable*

*Persistent*

*Energetic*

*Competitive and aggressive*

*Customer focused*

*Self disciplined*

*Assertive*

*Accepts supervision*

*Flexible and adaptable to change*

**2. List 3 important objectives for this person for the upcoming year.**

- 1.
- 2.
- 3.

**3. Indicate any changes in responsibility that may be a change or challenging.**

**4. What would you like this assessment to confirm about this candidate or employee?**

*Perceived Strengths:*

*Specific Areas of Concern:*

*Unidentified areas of need:*

**5. What specific challenges could this person anticipate?**

**6. How many individuals does/will he or she supervise?**

Identify the areas that are most important for success in the new position, by indicating the degree of importance on a scale of 1 being less important, and 5 being most important.

Competency	1	2	3	4	5	Important for Success?
<b>Leading and Deciding</b>						
Deciding & Initiating Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Leading & Supervising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Supporting and Cooperating</b>						
Working with People	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Adhering to Principles and Values <sup>1</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Interacting and Presenting</b>						
Relating and Networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Persuading & Influencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Presenting and Communicating Information <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Analyzing and Interpreting</b>						
Writing & Reporting <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Applying Expertise & Technology <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Analyzing <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Creating and Conceptualizing</b>						
Learning & Researching <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Creating and Innovating <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Formulating Strategies and Concepts <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Organizing and Executing</b>						
Planning & Organizing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Delivering Results & Meeting Customer Expectations <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Following Instructions & Procedures <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Adapting and Coping</b>						
Adapting and Responding to change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Coping with Pressures & Setbacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Enterprising and Performing</b>						
Achieving Personal Work Goals & Objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Entrepreneurial & Commercial Thinking <sup>2</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Taken from SHL, OPQ 32 results model