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## PSYCHOMETRIC WRITING

*Context: The following extract from a success profile was written following analysis of interview notes (based on interviews with senior organisational leaders by a psychologist), with reference to other senior profiles within the organisation. The profile was aimed at future success within the role.*

### SUCCESS PROFILE

#### OVERVIEW OF THE ROLE

The Head of Service Delivery is responsible for managing the delivery of a framework for BPOs and onshore operational processes to minimise expenditure and optimise profit. A key focus is to drive strategic outcomes and extract value through managing strategic partnerships. Customer engagement is pivotal to the continued success of the function and business. The role capitalises on continual innovation and process improvement to stay abreast of a competitive, expanding and technology-driven industry and broader retail market.

#### SPECIFIC CHALLENGES FACING HEAD OF SERVICE DELIVERY

<COMPANY> operates within an increasingly uncertain and complex environment. External and internal factors impacting this role include:

- Managing the logistics associated with a large, multi-location workforce
- Driving the development of an economically viable model for sustainable management of the onshore business
- Identifying offshoring opportunities and operating markets while retaining knowledge relating to offshore operations
- Capitalising on the emergence of competitive BPO labour markets
- Broad-scale stakeholder management and retention of positive vendor relationships
- Fostering innovation through technology, process re-engineering, product packaging, and online branding and bundling
- Building bench strength, providing stewardship for staff and developing a successor pipeline
- Ensuring optimal customer service levels by engendering a customer-centric culture focused on delivering quality at minimal cost
- Shaping a strategic vision of the retail customer, with consideration of increased self-sufficiency and online control
- Managing the risks attached to remote operations, multiple priorities and a complex matrix of stakeholder relationships

## DEVELOPMENT CENTRE REPORT

*Context: The following extract from a development centre report was written following analysis of voice recordings and interview notes (from a psychologist) based on a development centre, conducted in Asia, incorporating scenario-based role-plays, a 360° process and completion of a personality questionnaire.*

### Summary of Key Themes

#### Key Strengths

- Across the [leadership development program] [Participant] evidenced a depth of professional knowledge and expertise. [Participant]'s diverse legal and medical background further assisted him to bring broad insight and critical thinking to the program. Data from the 360° process support these areas as strengths in that he is seen to be knowledgeable, structured, and highly evaluative in his thinking style.
- During the [leadership development program] [Participant] offered meaningful contributions from a regulatory perspective. He assisted the group to develop insights with regard to the topic of Dengue fever as a disease state, as well as in relation to the regulatory environment.
- [Participant]'s personality profile indicates an innovative thinking style. He is likely to bring creative ideas to the table. He also indicates a preference for variety, suggesting that he should cope well with a range of tasks and responsibilities.
- [Participant]'s comfort with variety and change is supported by a reasonably 'thick-skinned' and moderately resilient demeanour overall. His level of focus and his effectiveness at work is unlikely to be derailed by setbacks or criticism. Even if he does feel stressed or slighted, this is unlikely to be particularly evident to those around him, given his fair tendency to conceal his emotions.
- [Participant] further profiles as strategic and fairly structured in his work approach. He is likely to consider long-term outcomes, and should work in an organised and methodical manner, checking details to ensure quality outcomes. This was evident during the [leadership development program], where [Participant] asked some questions in an attempt to establish a level of structure and work toward the integration of ideas.

#### Key Opportunities for Development

- While [Participant] demonstrated strength in his analytical and critically evaluative thinking style, he would benefit from broadening the scope of his thinking. Moving beyond facts and data to acknowledge less overt factors that impact outcomes would further strengthen his ability to achieve outstanding results.

*Continued next page*

- Linked with [Participant]'s need to consider the broader landscape, he would benefit from adopting an open-minded approach to others' views. His profile suggests a reasonable interest in analysing and understanding people, and he would benefit from drawing on this interest. Asking more questions would assist him to shape conversations, rather than impose a perspective that may not resonate with his audience. [Participant] could consider ways in which to coach his solutions as suggestions, and strive to gain others' buy-in and engagement by linking into their intrinsic drivers.
- [Participant]'s profile suggests a slight dislike of persuading people, and he does not see himself as someone who tends to proactively adopt a leadership role. Engaging more targeted influencing techniques to win people over to his way of thinking represents a further development opportunity. Once again, asking more questions would also assist him to secure the understanding of his audience, and he would benefit from ensuring that everyone's thinking is aligned before he progresses to the next step. He could also persuade others by providing rationale and context, and explaining the benefits of his ideas to shift their views.
- [Participant]'s responses to the personality questionnaire indicate a less sociable orientation than many of his peers. He sees himself as a reserved individual who tends to work independently, and he is disinclined to 'speak his mind'. This was evident during the [leadership development program], where [Participant] tended initially to withhold his opinions, and at times disengaged to work independently—particularly when disagreement with team members emerged, or where he became aware of a lack of efficient flow in proceedings. As such, [Participant] would benefit from consciously striving to listen, engage with others and adopt an inclusive approach in a team environment in order to reach mutually agreeable outcomes. In addition, it would be helpful for him to ensure that he proactively communicates his ideas at an early stage in interactions, particularly in cross-cultural group settings.
- More consciously listening and engaging with others would also assist [Participant] to help staff 'navigate the grey areas' and deal effectively with ambiguity. He would benefit from remaining consistently mindful of his inherent tendency to consider issues in a 'black and white' way that leaves no room for doubt, as many aspects of a complex leadership role are by nature less clear-cut, given—amongst other factors—the involvement of diverse individuals with multiple influences, backgrounds and contexts.
- Finally, [Participant] could benefit from drawing, to a greater degree, on his strengths in innovation and strategic thinking to contribute broad and creative suggestions. This would assist him to play a pivotal role in shaping long-term outcomes and solutions for the organisation.

## PSYCHOLOGICAL ASSESSMENT REPORTS

*Context: The following (extracts from) reports were written following interpretation of Occupational Personality Questionnaire profiles and ability test results. The reports were tailored to address job requirements and key competencies.*

### NATIONAL ACCOUNT MANAGER

#### AREAS OF STRENGTH

The following represent areas of strength based on the results of the assessment process.

- Mr Sample achieved an excellent result in the verbal reasoning test, outperforming 99% of the managerial comparison group. He also profiles with a fairly analytical thinking style; indicating a reasonable preference for working with facts and figures, along with a fair interest in critically evaluating information in order to determine potential errors. As such, Mr Sample is likely to be very adept and comfortable when it comes to analysing challenging qualitative business information, such as complex business reports and documentation.
- Mr Sample also performed soundly on the tests of numerical and inductive reasoning. Given his aforementioned quite analytical tendencies, Mr Sample is expected to be comfortable and capable in analysing challenging quantitative data, and conducting thorough competitor and category analyses. He should also be capable of determining trends in sales data, and solving problems from first principles. When combined with his highly theoretical thinking style, Mr Sample should be inclined to explore the broader commercial relevance of business data. He is expected to be at ease managing [Company] sales, profit and market share performance within the account, and maximising sales and gross profit across the national Woolworths business.
- As referenced, Mr Sample describes himself as highly conceptual in his thinking style. He also sees himself as a reasonably creative individual. He should thus embrace ideas others may consider too lateral or 'left field'. Further, his recommendations are very likely to take into consideration the broader needs of the business.
- Mr Sample's profile indicates a reasonable preference for taking charge of people and situations. He also reports a notably assertive nature, and should thus be comfortable sharing his views and providing feedback to his team. With a moderate preference to think for himself and a reasonable interest in persuading others of his line of thinking, Mr Sample is expected to be comfortable adopting a management role and setting a direction for his team. Considering his fairly ambitious and achievement-driven orientation, Mr Sample should actively strive to identify, in conjunction with other sales members, new customer and channel opportunities in order to build plans for distribution.

*Continued next page*

- Further to his interest in analysing data, Mr Sample indicates a reasonable interest in analysing people and getting to understand the motives underlying their behaviour. In addition, he sees himself as extremely inclined to consult and involve others in his decision-making. Together, these traits indicate that Mr Sample should be well placed to understand customer dynamics in order to drive agreed promotional programs. He is likely to make an active contribution to the team environment through sharing his knowledge and collaborating with others to build a high-performing team.
- Mr Sample further indicates a trusting and fairly caring approach, and he is moderately likely to adapt his behaviour to suit the situation or the individual with whom he is dealing. In addition, he should be reasonably confident approaching unfamiliar contacts and striking up a relationship. These tendencies are likely to enhance Mr Sample's capacity to communicate effectively with a range of business partners, managers and relevant stakeholders. Considering his extremely democratic tendency, Mr Sample should be proactive in building relationships and developing executive business plans in conjunction with other National Account Managers across customer bases.
- Mr Sample profiles as quite resilient. He sees himself as extremely optimistic in his outlook. Furthermore, he tends to be reasonably unfazed by personal criticism, and is unlikely to experience significant degrees of nerves or anxiety before important occasions or events. These tendencies, in combination with his moderately relaxed style, suggest that Mr Sample should bounce back quickly from any setbacks that he experiences.

#### **AREAS TO PROBE**

We recommend that the following areas be explored before progressing Mr Sample's application:

- Mr Sample reports a rather unstructured thinking style. He is slightly unlikely to adopt an organised approach, put plans in place to monitor progress, or focus on deadlines. In addition, he indicates a clear dislike of rules, guidelines and protocol. As such, how focused will he be on developing, executing and delivering the Customer Business and Contact Plans to the desired standard of accuracy, and in a timely manner? To what extent will he be willing to align with [Company]'s health and safety standards? How likely is he to systematically review the performance of team members to confirm compliance with their allocated responsibilities?
- Mr Sample indicates a strong preference to express his emotions openly. For the most part this is likely to impact positively on colleagues and customers, given buoyant and quite relaxed nature. However, given his notably trusting and extremely optimistic tendencies, there may be times when Mr Sample could come across as a little naïve in his judgement of others. To what extent is he able to control and conceal the expression of extreme emotions or any frustrations he may experience?
- Mr Sample indicates a slight preference to be cautious in decision-making. How willing is he to act promptly to resolve situations? How likely is he to draw on his optimism in order to quickly grasp narrow windows of opportunity?

## HSE ADVISOR

### Areas of Strength

The following represent areas of strength based on the results of the assessment process.

- Ms Sample profiles as a fairly structured individual. She also indicates that she quite enjoys routine, and thus is unlikely to be fazed by repetitive tasks such as compiling reports and managing claims files. She should also be fairly detailed and organised in tracking the progress of the HSE Action Plan.
- Ms Sample further reports a strong preference to adhere to organisational rules and guidelines, and she slightly prefers working with well-established methods. As such, she is likely to be focused on ensuring that all Health, Safety and Environment Systems and goals are adhered to, while meeting the organisation's policies and standards for HSE.
- Ms Sample profiles as a fairly people-oriented individual; she would rather work in a team than on her own, and is likely to place the needs of the team above any personal or competitive gain. She is also inclined to consult others in decision-making, and describes herself as an adaptable individual—she is certainly willing to adjust her style to match the needs of the situation or the person with whom she is interacting. Her inclusive and flexible style is likely to enhance her ability to build positive relationships across the organisation.
- Notwithstanding her fairly democratic approach, Ms Sample is reasonably willing to 'speak her mind' and state her views. This should assist her in proactively providing advice to leaders, employees and contractors to assist them to fulfil their obligations under relevant OHS and other Acts, Regulations, Codes of Practice and Standards. She should be willing to objectively conduct incident investigations, if required.
- Ms Sample indicates a reasonable preference to work with facts and figures, and so should harness factual information to inform her actions and decisions (however, see *Areas to Probe*). She also profiles as someone who enjoys conceptual thinking, and is fairly likely to contribute a level of innovation. She should thus be able to apply lateral thinking along with a factual approach in reviewing compensation claims and HSE performance.
- Ms Sample sees herself as someone who is extremely 'thick-skinned'. She is thus likely to be highly receptive to criticism, and while she should express her emotions openly, any negative reactions to her enthusiasm should not way her down. Her moderately relaxed nature, combined with a reasonable enjoyment of a busy schedule, means Ms Sample should enjoy being busy without becoming easily stressed, and any criticism of her efforts is unlikely to derail her efforts.

## Areas to Probe

We recommend that the following areas be explored before progressing Ms Sample's application:

- Notwithstanding her fairly data-oriented thinking style, Ms Sample performed in the well below average range on the test of numerical reasoning. She is expected to experience significant difficulty in interpreting statistics and numbers. How effectively does Ms Sample utilise any numerical or statistical data available in her role to inform her decisions? How competent will she be when it comes to reviewing information to ensure business outcomes and budgets are achieved?
- Ms Sample also performed in the below average range on the tests of verbal and inductive reasoning. She is expected to experience difficulty in working with complex written information. She may also be less effective than her peers in solving novel problems or identifying trends in data. To what extent will this affect her efficiency when preparing reports relating to workers compensation claims and HSE performance? How competent will she be when it comes to reviewing information to ensure compliance with WorkCover Performance Standards?
- Perhaps in line with her fairly inclusive nature, Ms Sample somewhat prefers to follow the consensus, rather than adopting an independent stance. She also indicates a slight dislike of taking control of situations or people, and does not see herself as particularly confident in formal situations or when meeting people for the first time. To what extent will these preferences detract from her capacity to liaise confidently with a range of stakeholders within her remit of managing and administering a portfolio of WorkCover claims, and carrying out the role of Return to Work Coordinator?
- As noted, Ms Sample sees herself as very likely to follow the rules, and may feel uncomfortable when the 'right' direction is not clear. She also indicates a slight preference for routine and conventional methods in her work. In addition, her clear preference to express her feelings means others may be very aware when she feels upset. How comfortable is she likely to be dealing with variances in her daily routine or 'the way things are done'; and how does she convey her reactions in this regard in order to maintain a positive working environment? How effectively does she deal with ambiguity? How comfortable will she be tackling unexpected events that may disrupt her plans and schedule?

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## SALES MANAGER

<b>MOTIVATING OTHERS</b>				
<i>Significant Development Need</i>	<i>Development Need</i>	<i>Effective</i>	<i>Strength</i>	<i>Key Strength</i>
<ul style="list-style-type: none"> <li>▪ Ms Surname describes herself as an influential, highly persuasive individual who is as comfortable as her peers directing others. As a result, she should sell the vision and strategy of the organisation to her team and ensure that they buy into their goals and objectives.</li> <li>▪ Ms Surname also profiles as a reasonably consultative person; she tends to involve her team and colleagues in decision-making. Her fairly inclusive style is complemented by a moderate preference to analyse people and determine what 'makes them tick'. As such, she is likely to develop an understanding of how best to motivate the people in her team. In addition, she is apt to invite and engage in open discussion, which should in turn provide her with an avenue for hearing about team members' goals and career aspirations.</li> <li>▪ Further to her fairly consultative demeanour, Ms Surname indicates a clear inclination to adapt her style to suit a particular situation or individual. Her moderately supportive, empathetic nature, along with her capacity to flex her approach, should assist her in tailoring her motivational style to empower diverse personalities within her team.</li> <li>▪ Ms Surname's responses to the personality questionnaire indicate a fairly optimistic nature, along with a moderate level of ambition to achieve challenging targets and to succeed in career terms. Along with her reasonable level of competitive drive, Ms Surname is likely to be comfortable encouraging others to succeed. However, her strong preference for a steady pace at work may somewhat detract from her capacity to motivate others with energy and enthusiasm.</li> </ul>				

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## LEADERSHIP DEVELOPMENT REPORT: 'JACK JOHNSON'

(SOURCE ORF INFORMATION ON FOLLOWING PAGE; OPQ WRITE-UP & SUMMARY - OWN)

### RESULTS & PERFORMANCE DRIVEN

#### Coaching Role-play

- Mr [Johnson]'s performance in the Coaching Role Play was characterised by a confident and enthusiastic style, which in turn inspired confidence in his subordinate—Kim believed that progress would be made on the project. Mr [Johnson] was able to demonstrate his ability to drive results through others.
- Mr [Johnson] focused on salvaging timeframes to bring the project back on track, and provided Kim with advice regarding managing Daniel's expectations, e.g. 'I think it's good to keep Daniel informed so there are no surprises down the track'.
- By the end of the meeting Mr [Johnson] had agreed on some action steps and outcomes with Kim, such as that an interim report would be drafted on the information to date to enable a review prior to delivery to Daniel. He also determined that Kim was to respond to Daniel to update him on the status of the project; and a meeting would be arranged with the engineers. Mr [Johnson] determined to meet with Daniel to establish his views on the engineers and possible courses of action.
- To improve, Mr [Johnson] needed to set timeframes around actions and establish clear follow-up—this would have demonstrated a commitment to flawless execution.

#### Occupational Personality Questionnaire

- Mr [Johnson]'s responses to the OPQ indicate an overall style that is distinctly socially driven and influential, but highly unstructured. His profile indicates an extreme level of flexibility regarding deadlines and completion, along with a marked preference for achievable rather than highly stretching targets. These tendencies may at times detract from his readiness to accept challenging projects; or motivate others to persist with tasks and ensure that goals are achieved within established timeframes.
- Though very decisive, Mr [Johnson] is slightly more inclined to base his decisions on 'gut feel' than facts and figures. This may at times mean that a course of action is not well thought through prior to taking action.
- Mr [Johnson] should be as inclined as most to analyse people's motives in driving results through others.

## Summary

- Overall, this was assessed as an area of effective performance at the Senior Leadership level. Mr [Johnson] demonstrated enthusiasm and confidence in driving results through others. To improve at a senior level, he would benefit from adopting a more structured approach, and establishing timeframes around actions. Mr [Johnson] may also wish to consider to what extent he thinks through the validity and pertinent details relating to data before committing to a decision.

### SOURCE: ORF INFORMATION

#### *Coaching Role Play*

*By the end of the meeting [Jack] had agreed with Kim that an interim report would be drafted on the information he had to date, so he could review it before it went to Daniel; Kim was to respond to Daniel to update him on the status of the project; and a meeting was to be set up with the engineers. [Jack] was also going to meet with Daniel to get his views on the engineers and possible courses of action. He asked Kim to brief him on the status of the rest of the project in the hope that they could salvage the timelines to bring the project in on time.*

*Provided Kim with advice regarding managing Daniel's expectations 'I think it's good to keep Daniel informed so there are no surprises down the track'*

*Having some timescales around the actions and an agreed time to meet for review may have cemented these further.*

*[Jack] infected Kim with his confidence and enthusiasm believed that progress would be made on the project.*

#### *Integration Notes*

*Coaching R/P – In terms of driving results through others did this well, his infectious enthusiasm was good, Kim felt confident that things would happen. Focused on salvaging time frames to bring the project back on time, managed Daniel's expectations.*

*Needed to set timeframes around actions and establish some follow-up*

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## COMPARATIVE ANALYSIS

*Context: The extract below is taken from a report written following comparative analysis of the Occupational Personality Questionnaire profiles of twelve members of a leadership team.*

LEADERSHIP	3
<ul style="list-style-type: none"> <li>▪ Though combined responses lead to an average rating, the team overall profiles as less influential than other Australian managers. Most respondents indicate a slight to definite dislike of using persuasion or negotiation to convince others, with only one (C) indicating a moderate interest in this regard. In addition, only one participant (K) is more than moderately interested in taking control of people or situations, with one (A) indicating a strong dislike of telling others what to do.</li> <li>▪ Respondents vary slightly in terms of their sociability and inclusiveness as a leader. Most respondents profile as at least moderately outgoing; however, P describes himself as highly outgoing, while S profiles as reserved in her leadership style. Similarly, where most participants profile as at least moderately consultative, A describes himself as having a slight preference for making decisions without consultation.</li> <li>▪ As such, the common theme relates to a relative disinclination in terms of negotiation and taking the lead; along with a predominant tendency toward an outgoing and inclusive style.</li> </ul>	
<h3>Key Similarities</h3>	
<ul style="list-style-type: none"> <li>▪ Persuasion and negotiation - relatively low to moderate interest. How effectively does the leadership team sell their vision and ideas to the rest of the organisation and to external contacts?</li> <li>▪ Taking the lead - relatively low to only a slight interest. How effectively does the leadership team lead from the front when required, e.g. in a crisis?</li> </ul>	
<h3>Key Differences</h3>	
<ul style="list-style-type: none"> <li>▪ Outgoing – varies from highly outgoing to clearly reserved; though most respondents tend toward an outgoing style.</li> <li>▪ Consultative – varies from highly consultative to slight preference to make decisions alone; though most respondents indicate an inclusive style.</li> </ul>	