

SELECT Retail Banking Overview

SELECT for Retail Banking is a group of personality-based surveys designed to measure characteristics that have been found to predict job effectiveness for positions in retail banking work environments.

Through our research with banking and financial institutions, we have identified several key personality characteristics that contribute to job success. **SELECT for Retail Banking** allows you to hire associates who are sales oriented, will work cooperatively, and will positively interact with customers. It also allows you to hire managers who will lead a team of banking sales associates, emphasize overall branch performance, juggle multiple demands, effectively lead and coach others, and demonstrate the drive to succeed. **SELECT for Retail Banking** will also help to screen out applicants with low integrity and those who are poorly suited for these types of roles.

What Does It Measure?

The two central indices are Integrity and Performance. Each Performance Index has been validated to predict the traits associated with successful performance in the specific role. The Integrity Index has been validated to predict the attitudes, personal integrity, and work ethic required in most associate and entry-level manager roles.

- [Banking Sales Associates](#)
- [In-store Sales Associates](#)
- [Branch Managers](#)
- [Banking Service Associates](#)

Combo surveys are available for determining fit with either a branch sales or service role and for determining fit for sales within either a branch or in-store environment. The retail banking math module indicate a measure of an individual's ability to solve math problems relevant to the retail banking environment including items around basic arithmetic, percentages, financial word problems, making change and number matching. The manager math module includes items that require candidates to analyze tables and charts relevant to understanding branch sales reports.

SELECT to Hire the Best

SELECT for Retail Banking has been validated for use with people who work in traditional, stand-alone branches and in-store branches that offer a sales-oriented, cross-functional approach to service and sales with customers. Four versions of the survey have been developed to meet the needs of the banking industry.

- **Banking Sales Associates:** handle daily customer transactions and sell retail banking services such as loans, investments, and checking services, and who are provided incentives for promoting products and services.
- **In-store Sales Associates:** work as sales associates within an in-store banking environment.
- **Branch Managers:** manage the daily operations of the branch, promote customer services, are provided incentives for the performance of the branch, and work closely with their team to be successful.
- **Banking Service Associates:** service only positions such as Tellers (adapted version of **SELECT for Customer Service**).