



TOOLKIT

# People Data

---



# Contents

- Helpful to Remember . . . . . 2
- Primary Factors . . . . . 3
- The Whole Pattern . . . . . 4
- Summary of Motivating Needs . . . . . 6
- Summary of Behaviors . . . . . 7
- Continuums of Expression . . . . . 8
- Factor Combinations. . . . . 10
- Summary of Factor Combinations . . . . . 11
- Workplace Behaviors for Factor Combinations . . . . . 18
- The A:D Relationship: Taking Risks and Making Decisions . . . . . 22
- Situation A=D . . . . . 23
- A=D Variations . . . . . 23
- Reference Profiles . . . . . 24
- Analytical Profiles – A > B, Low C . . . . . 25
- Socially Driven Profiles – High B . . . . . 26
- Stabilizing Profiles – Low A, B with High C, D . . . . . 27
- Persistent Profiles – A > B, High C . . . . . 28
- Self-Concept Change Guidelines . . . . . 29
- Factor M. . . . . 30
- Factor E . . . . . 31
- The PI Cognitive Assessment. . . . . 32
- Frequently Asked Questions . . . . . 34
- Contact The Predictive Index . . . . . 38

NOTICE: All marketing and other materials (collectively “Materials”) created by The Predictive Index are copyright protected by Predictive Index, LLC. You acknowledge that The Predictive Index is the exclusive owner of all rights, title and interest in the Materials and all copyrights therein. The Materials are provided to you for your internal use only. You may not distribute the Materials, in whole or in part, in any manner whatsoever, without prior written approval from The Predictive Index. You may not embed or copy The Predictive Index’s videos, images, audio clips or other creative content, or any portions thereof, into your own marketing materials. You may not make modifications to the Materials or create derivative works based on the Materials. Violations of this notice and/or The Predictive Index Branding Guidelines may constitute a breach of your license agreement. The Predictive Index reserves all rights in connection with the Materials.

# Helpful to Remember

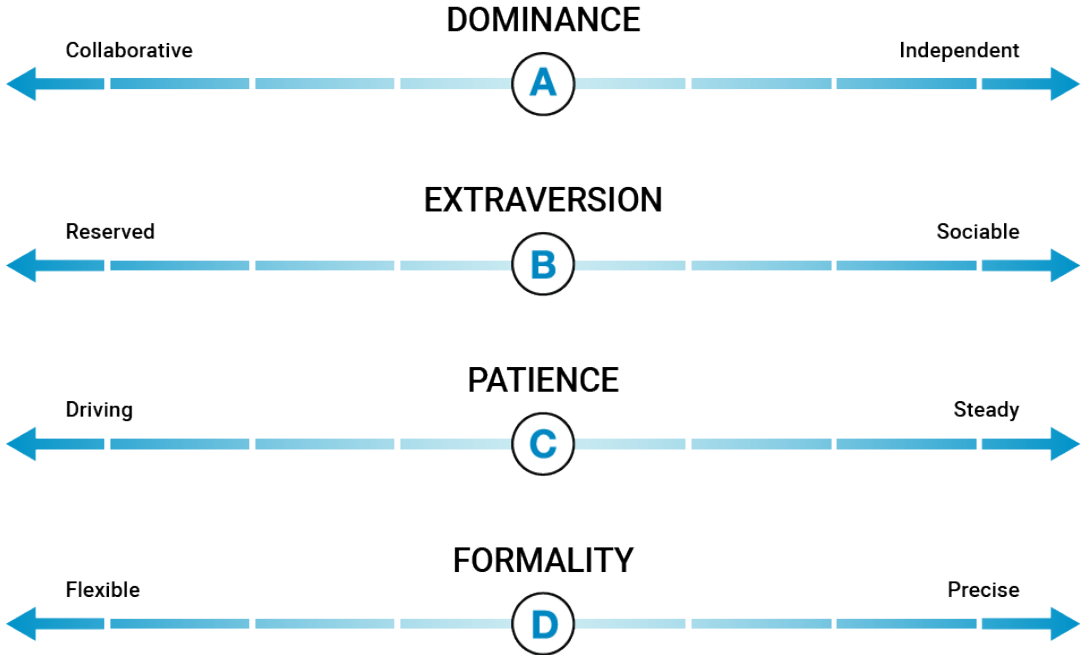
PI Practitioners should remember these suggestions when conducting a readback of a Predictive Index behavioral pattern:

- Prepare in advance for the readback session.
- Describe a person – not an abstract pattern.
- Remain neutral and nonjudgmental in your feedback.
- Avoid pointing to the PI behavioral pattern when giving feedback.
- When reading the Self Pattern, remember that it is referring to “what comes naturally” for the assessment taker.
- There are specific positive behaviors in every pattern – describe them first and be definite.
- Study the Primary Factors and Factor Combinations – determine how they influence needs, behaviors, and motivations.
- Recognize Reference Profiles to simplify feedback.
- Note the Self-Concept – use terms like “You feel the need to be...” or “You are trying to be/become...” when giving feedback about Self-Concept.
- Observe the Synthesis which is how the person usually behaves in the work environment. Synthesis = Self + Self-Concept.
- When giving feedback about Factor E and decision making, remember that a Low E suggests subjectivity (the person relies on intuition and emotions to make decisions), and a High E suggests objectivity (the person uses logic and facts to make decisions).
- Always consider all data (work experience and achievement, education, job requirements, etc.) in conjunction with the PI results.

# Primary Factors

The four Primary Factors measured by PI are Factor A (Dominance), Factor B (Extraversion), Factor C (Patience) and Factor D (Formality).

Each of the four Primary Factors is a drive to behave in a particular way, and each is different from the others. Every individual has all four Factors in his or her total pattern of behavior.



**Dominance:** The drive to exert one’s influence on people or events

**Extraversion:** The drive for social interaction with other people

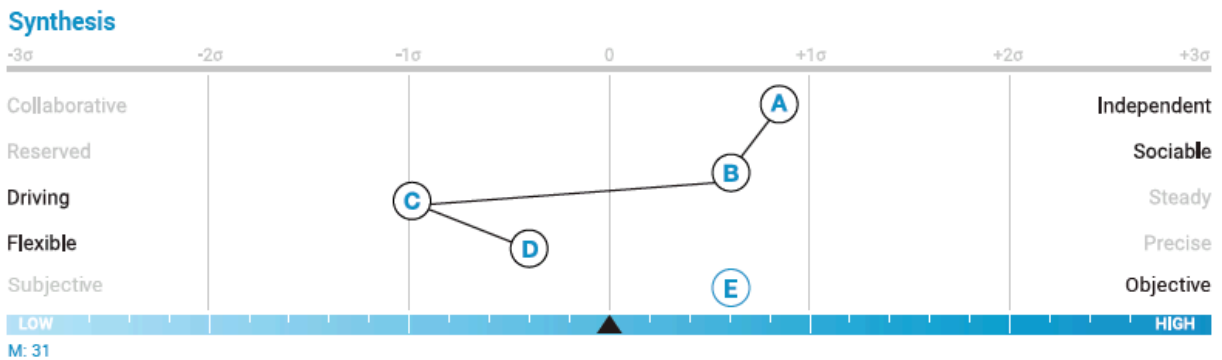
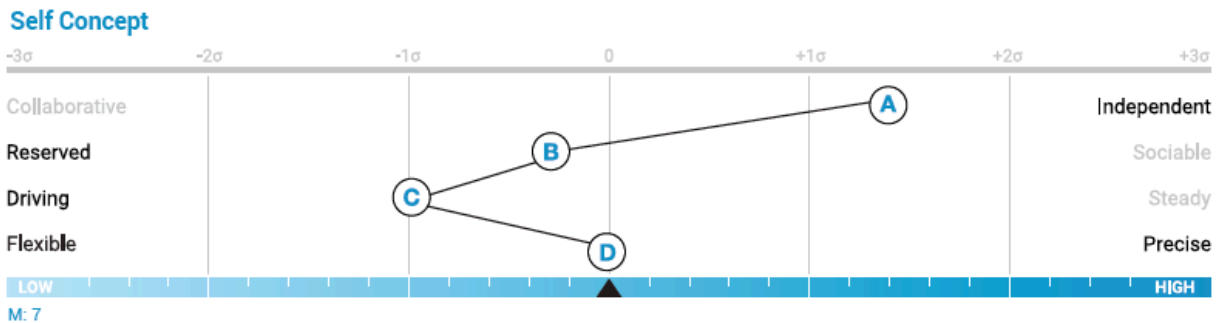
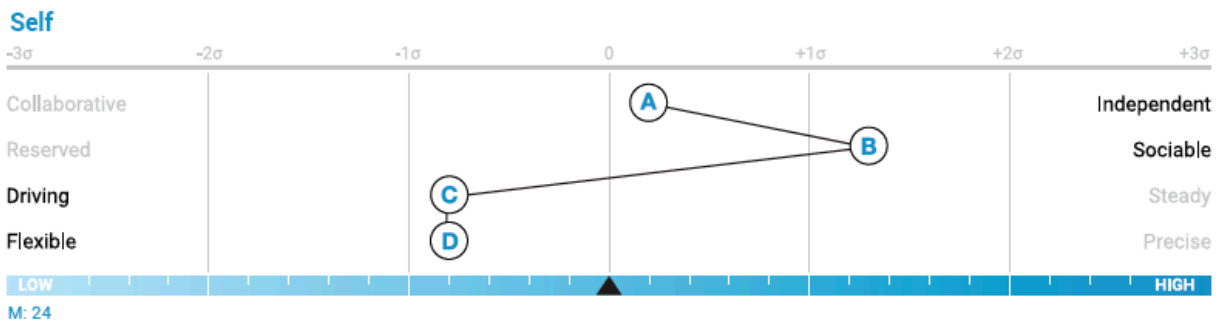
**Patience:** The drive for consistency and stability

**Formality:** The drive to conform to rules and structure

# The Whole Pattern

There are 3 patterns in the full behavioral pattern:

- **Self:** Basic motivations and needs
- **Self-Concept:** How you think you need to adapt in response to the current environment
- **Synthesis:** Average of Self and Self-Concept





# Summary of Motivating Needs

	Low Amount of Factor	High Amount of Factor
<b>Factor A Dominance</b>	<ul style="list-style-type: none"> <li>• Encouragement</li> <li>• Reassurance</li> <li>• Harmony</li> <li>• Understanding</li> <li>• Team recognition</li> <li>• Freedom from individual competition</li> <li>• Opportunities to collaborate</li> </ul>	<ul style="list-style-type: none"> <li>• Independence</li> <li>• Control of own activities</li> <li>• To be challenged</li> <li>• Understanding of the big picture</li> <li>• Autonomy in problem solving</li> <li>• Individual recognition</li> <li>• Opportunities to compete</li> </ul>
<b>Factor B Extraversion</b>	<ul style="list-style-type: none"> <li>• Opportunities to reflect</li> <li>• Room for introspection</li> <li>• Freedom from office politics</li> <li>• Private recognition</li> <li>• Privacy</li> <li>• Time to trust others</li> <li>• Opportunities to work with facts</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunities to interact</li> <li>• Social acceptance</li> <li>• Opportunities to influence</li> <li>• Public recognition</li> <li>• Connection with others</li> <li>• Visible signs of accomplishments</li> <li>• Opportunities to work with others</li> </ul>
<b>Factor C Patience</b>	<ul style="list-style-type: none"> <li>• Variety</li> <li>• Opportunities to work at a faster than average pace</li> <li>• Mobility</li> <li>• Freedom from repetition</li> <li>• Opportunities to handle multiple priorities</li> <li>• Freedom from routine</li> <li>• Change</li> </ul>	<ul style="list-style-type: none"> <li>• Long-term affiliation</li> <li>• Ability to work at a steady pace</li> <li>• Familiar surroundings</li> <li>• Stable work environment</li> <li>• Freedom from changing priorities</li> <li>• Supportive work team</li> <li>• Recognition for loyalty</li> </ul>
<b>Factor D Formality</b>	<ul style="list-style-type: none"> <li>• Freedom from rigid structure</li> <li>• Freedom of expression</li> <li>• Opportunities to delegate details</li> <li>• Freedom from rules and controls</li> <li>• Flexibility</li> <li>• Informality</li> <li>• Opportunities to be spontaneous</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of rules and regulations</li> <li>• Specific knowledge of the job</li> <li>• Freedom from risk of error</li> <li>• Time to gain expertise</li> <li>• Recognition for depth of knowledge</li> <li>• Clarity of expectations</li> <li>• Certainty</li> </ul>



# Summary of Behaviors

	Low Amount of Factor	High Amount of Factor
<b>Factor A Dominance</b>	<ul style="list-style-type: none"> <li>• Cooperative</li> <li>• Accepting of company policies</li> <li>• Accommodating</li> <li>• Supportive</li> <li>• Harmony-seeking</li> <li>• Collaborative</li> </ul>	<ul style="list-style-type: none"> <li>• Independent</li> <li>• Assertive</li> <li>• Venturesome</li> <li>• Challenging</li> <li>• Comfortable with conflict</li> <li>• Authoritarian</li> </ul>
<b>Factor B Extraversion</b>	<ul style="list-style-type: none"> <li>• Introspective</li> <li>• Matter-of-fact</li> <li>• Analytical</li> <li>• Imaginative</li> <li>• Reflective</li> <li>• Pensive</li> </ul>	<ul style="list-style-type: none"> <li>• Outgoing</li> <li>• Personable</li> <li>• Convincing</li> <li>• Animated</li> <li>• Enthusiastic</li> <li>• Expressive</li> <li>• Sociable</li> </ul>
<b>Factor C Patience</b>	<ul style="list-style-type: none"> <li>• Intense</li> <li>• Restless</li> <li>• Driving</li> <li>• Impatient</li> <li>• Rushed</li> <li>• Brisk</li> </ul>	<ul style="list-style-type: none"> <li>• Peaceful</li> <li>• Patient</li> <li>• Stable</li> <li>• Calm</li> <li>• Serene</li> <li>• Comfortable with the familiar</li> <li>• Steady</li> </ul>
<b>Factor D Formality</b>	<ul style="list-style-type: none"> <li>• Informal</li> <li>• Tolerant of uncertainty</li> <li>• Flexible</li> <li>• Spontaneous</li> <li>• Non-conforming</li> <li>• Casual</li> <li>• Adaptable</li> </ul>	<ul style="list-style-type: none"> <li>• Serious</li> <li>• Meticulous</li> <li>• Conservative</li> <li>• Thorough</li> <li>• Deliberate</li> <li>• Conventional</li> <li>• Disciplined</li> </ul>

# Continuums of Expression

As PI Factor measurements move farther away from the Midpoint – either higher or lower – the associated behaviors tend to become stronger or more forcefully expressed. The continuum grid below intentionally uses strong language at the far left and far right positions in order to illustrate greater expression and emphasis of each drive as the Factors move farther from the Midpoint.

Midpoint			
		<b>Low</b>	
	3 sigma low Extremely Low	2 sigma low Very Low	1 sigma low Moderately Low
<b>Factor A Dominance</b>	<b>Agreeable</b> Extremely Agreeable Deferential Compliant Accommodating	Very Agreeable Cooperative Accepting Collaborative	Moderately Agreeable Unselfish Receptive Supportive
<b>Factor B Extraversion</b>	<b>Reserved</b> Extremely Reserved Frank Guarded Private	Very Reserved Quiet Introspective Pensive	Moderately Reserved Collected Thoughtful Reflective
<b>Factor C Patience</b>	<b>Impatient</b> Extremely Impatient Hasty Intense Rushed	Very Impatient Restless Abrupt Rapid	Moderately Impatient Hurried Brisk Quick
<b>Factor D Formality</b>	<b>Non-conforming</b> Extremely Flexible Spontaneous Unstructured Improvising	Very Flexible Nonchalant Instinctive Carefree	Moderately Flexible Casual Uninhibited Adaptable
Midpoint			

Midpoint					
		High			
1 sigma high Moderately High		2 sigma high Very High		3 sigma high Extremely High	
Moderately Assertive Independent Determined Autonomous		Very Assertive Competitive Venturesome Directing		<b>Assertive</b> Extremely Assertive Aggressive Authoritarian Challenging	<b>Factor A Dominance</b>
Moderately Outgoing Sociable Talkative Open		Very Outgoing Personable Enthusiastic Animated		<b>Outgoing</b> Extremely Outgoing Expressive Gregarious Convincing	<b>Factor B Extraversion</b>
Moderately Patient Stable Calm Composed		Very Patient Measured Unhurried Peaceful		<b>Steady</b> Extremely Patient Habitual Steady Serene	<b>Factor C Patience</b>
Moderately Careful Conservative Thorough Serious		Very Careful Disciplined Deliberate Conventional		<b>Conforming</b> Extremely Careful Conforming Meticulous Structured	<b>Factor D Formality</b>
Midpoint					

# Factor Combinations

- The interaction between two Primary Factors is known as a Factor Combination
- The wider the spread between the two Factors in the combination, the stronger the expression of the relationship in the person’s behavior.
- Combinations that cross the pattern’s Midpoint are typically the most pronounced and will result in a much stronger expression of the relationship between the two Factors.

Orientation	<p><b>A &gt; B   Task Oriented</b></p> <ul style="list-style-type: none"> <li>• Critical, creative thinker</li> <li>• Technical orientation</li> <li>• Inquiring mind</li> <li>• Problem solver</li> <li>• Limited delegation of authority</li> </ul>	<p><b>B &gt; A   People Oriented</b></p> <ul style="list-style-type: none"> <li>• Empathetic</li> <li>• Persuasive</li> <li>• Sociable</li> <li>• Service-oriented</li> <li>• Delegates authority</li> <li>• Comfortable on a team</li> <li>• Unselfish</li> </ul>
	<p><b>A &gt; C   Proactive</b></p> <ul style="list-style-type: none"> <li>• Takes initiative</li> <li>• Competitive</li> <li>• Driven to get things done</li> <li>• Positive response to pressure</li> <li>• Fast-paced</li> <li>• Achievement-oriented</li> <li>• Impatient with routine</li> </ul>	<p><b>C &gt; A   Responsive</b></p> <ul style="list-style-type: none"> <li>• Consistent with repetitive work</li> <li>• Cooperative with others</li> <li>• Tolerant</li> <li>• Patient</li> <li>• Dependable</li> <li>• Steady</li> <li>• Easygoing</li> </ul>
Risk	<p><b>A &gt; D   Comfortable with Risk</b></p> <ul style="list-style-type: none"> <li>• Independent</li> <li>• Individualistic</li> <li>• Self-confident</li> <li>• Firm</li> <li>• Decisive</li> <li>• Venturesome</li> <li>• Resistant to authority</li> </ul>	<p><b>D &gt; A   Cautious with Risk</b></p> <ul style="list-style-type: none"> <li>• Cooperative</li> <li>• Supportive</li> <li>• Willing and helpful</li> <li>• Need for rules and structure</li> <li>• Accurate and careful</li> <li>• Concerned about criticism</li> <li>• Conservative</li> </ul>

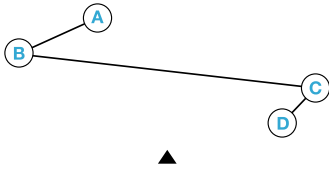
# Summary of Factor Combinations

The tables below provide a summary of descriptions for Factor Combinations that cross the Midpoint (one High, one Low). For Factor Combinations that are both Higher or Lower than the Midpoint, please refer to the pages that follow.

Connection	<b>B &gt; C   Quick to Connect</b> <ul style="list-style-type: none"> <li>• Fluent</li> <li>• Fast-talking</li> <li>• Lively</li> <li>• Enthusiastic</li> <li>• Optimistic style of expression</li> <li>• Persuasive</li> <li>• Motivates others</li> <li>• Stimulating</li> <li>• Positive communication</li> </ul>	<b>C &gt; B   Takes Time to Connect</b> <ul style="list-style-type: none"> <li>• Reserved</li> <li>• Quiet</li> <li>• Serious with unfamiliar people</li> <li>• Comfortable with the familiar</li> <li>• Introspective</li> <li>• Takes time to think</li> <li>• Organizes thinking before expressing self</li> </ul>
	<b>B &gt; D   Informal</b> <ul style="list-style-type: none"> <li>• Extraverted</li> <li>• Outgoing</li> <li>• Uninhibited expression of friendliness</li> <li>• Poised</li> <li>• Informal in social situations</li> <li>• Enthusiastic, persuasive talker</li> <li>• Engaging conversationalist</li> </ul>	<b>D &gt; B   Formal</b> <ul style="list-style-type: none"> <li>• Serious</li> <li>• Disciplined</li> <li>• Sincere</li> <li>• Reserved, formal and quiet</li> <li>• Factual conversationalist</li> <li>• Sensitive to criticism</li> <li>• Cautious with new people</li> </ul>
Rules	<b>C &gt; D   Casual with Rules</b> <ul style="list-style-type: none"> <li>• Persistent</li> <li>• Casual</li> <li>• Stable</li> <li>• Limited concern about rules or details</li> <li>• Comfortable with ambiguity</li> <li>• Easygoing</li> <li>• Relaxed</li> </ul>	<b>D &gt; C   Careful with Rules</b> <ul style="list-style-type: none"> <li>• Conscientious</li> <li>• Thorough</li> <li>• Precise</li> <li>• Concerned with rules and accuracy</li> <li>• Strong follow-up</li> <li>• Strict about punctuality and correctness</li> <li>• Comfortable with clarity</li> </ul>

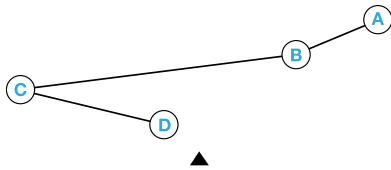
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher A/Lower B



### Both Low

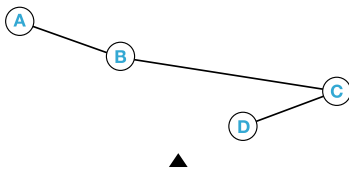
Analytical; with Low A, less venturesome. Doing things in a more cautious, practical way. Ingenious problem solving, based on detailed information. Management style is authoritative, with less talk and more discipline. Very little delegation of authority.



### Both High

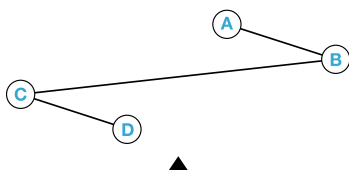
Also analytical, but with less introspection. Analyzes and solves problems with more input from others. With the High A, more venturesome, and highly inquisitive. Interests are less abstract and more practical. Some delegation of authority.

## Higher B/Lower A



### Both Low

Some social orientation, but less interactive and empathetic than High B. Friendly, in a quiet and unassuming way. Seeks harmonious involvement with the team.

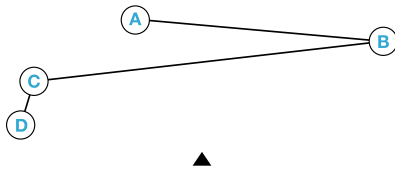


### Both High

Same social orientation along with enthusiasm and persuasiveness. More assertive and demanding, operating with greater self-interest and goal orientation. Will delegate authority, but will demand results. Assertive, more likely to be a team leader than a team member.

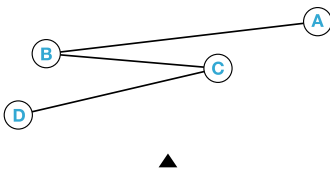
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher A/Lower C



### Both Low

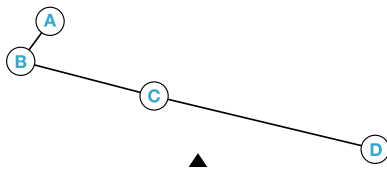
Initiative and proactive action when it's clear that actions will help team efforts. Sense of urgency and drive to get things done quickly and supportively. Contributes to company/team agenda by multitasking and avoiding routines.



### Both High

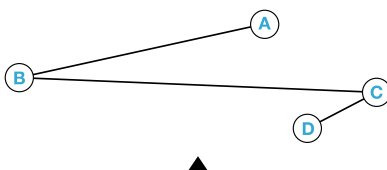
Assertive and proactive in a steady, methodical way. Pursues own goals and agenda, at own pace. Demanding and openly challenging with a persistent, even-tempered approach.

## Higher C/Lower A



### Both Low

Responsive and quick to act to contribute to agreed agenda. Generally ready to spring into action to lend a hand or respond to the needs of the job or others.

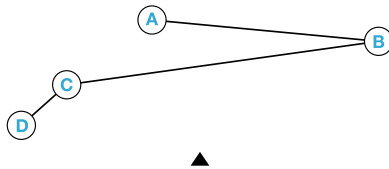


### Both High

Composed, unruffled and systematic in pursuing own goals. Persistent and self-confident. Steadily and calmly keeps own agenda moving forward, one step at a time.

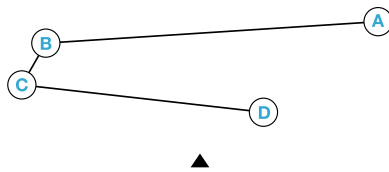
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher A/Lower D



### Both Low

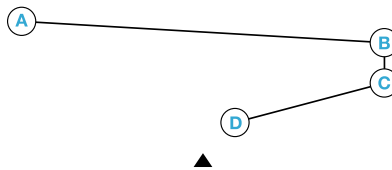
Free delegation of details and freewheeling approach to “the book,” with less emphasis on independence, individualism, self-confidence.



### Both High

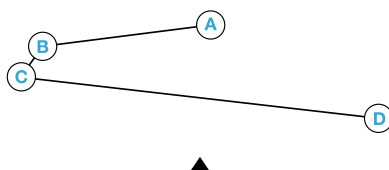
Retains emphasis on independence, individualism and self-confidence. Seeks control not only of results/outcomes but also of the specifics/details of the process. More demanding about how things are done, less risk-tolerant. Needs more information in order to take action.

## Higher D/Lower A



### Both Low

Emphasis on cooperation and supportiveness. A willing and helpful worker. Less need for adhering to the rules, more casual about details.



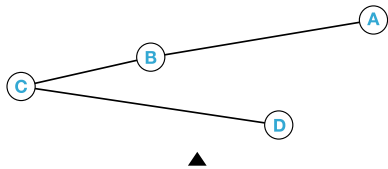
### Both High

Strong need to go “by the book,” do it right. Concern for independence and autonomy within their defined area of responsibility. Demand for results based on a conservative interpretation of the rules; accuracy, thoroughness.



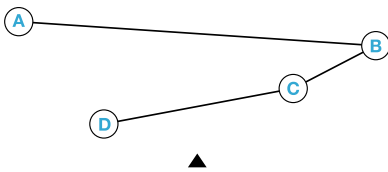
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher B/Lower C



### Both Low

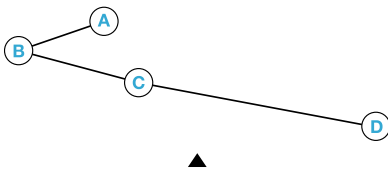
Sense of urgency and drive to get things done, mostly focusing on tasks rather than people. Impatient with routines. Organizes thoughts mentally, and once ready, takes action quickly. Somewhat reserved in initial contact with others. Less reserved as familiarity increases.



### Both High

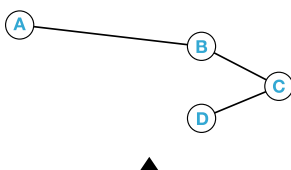
Warm, open and very talkative. Proactive in building relationships in a steady and calm way through conversation, focused listening and willingness to share. Generally upbeat manner. Focused on social matters rather than things and tasks.

## Higher C/Lower B



### Both Low

Focused on tasks rather than social matters, with a drive to get things done quickly. Reserved and serious, especially around new people. Quiet and thoughtful, thinks before speaking, generally discusses work topics, not personal ones.

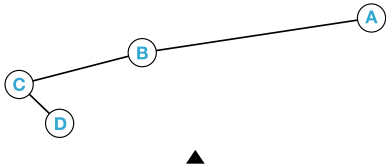


### Both High

Patient, calm and easygoing with others. Unhurried in forming new relationships. Listens well, is open and responsive. Comfortable and talkative with others, particularly familiar colleagues, family and friends.

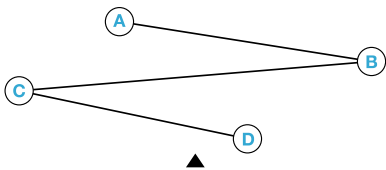
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher B/Lower D



### Both Low

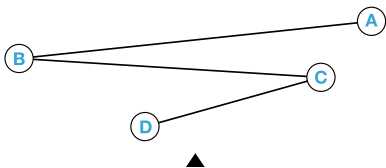
Informal and independent. Imaginative, focused on technical matters of his/her own choosing. Speaks about concepts and other intangibles. Relatively comfortable delegating details.



### Both High

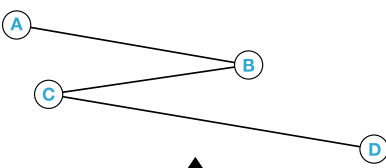
Warm, lively, social and very talkative. Builds relationships easily, while generally staying within what he or she considers to be the proper bounds of social interaction. Some delegation of detail, with strong, friendly follow-up.

## Higher D/Lower B



### Both Low

Reserved and private. Uses few words to get the point across. Generally speaks about ideas and concepts that interest him or her. Unencumbered by social rules.

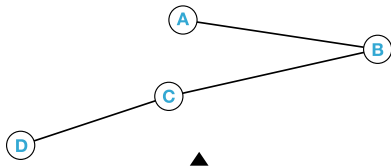


### Both High

Formal, social and proper. Stays within his or her idea of acceptable social boundaries while collaborating and advancing relationships. Prefers to work together rather than delegating details. Detailed and talkative in communication.

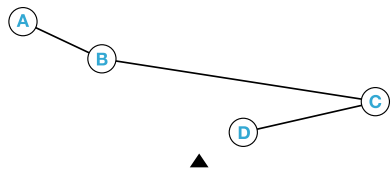
The reference graphics that follow should be used when both Factors appear either Higher or Lower than the Midpoint.

## Higher C/Lower D



### Both Low

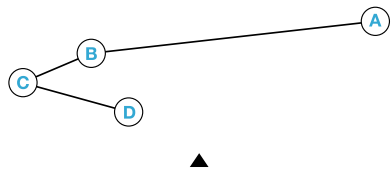
Very informal, uninhibited, freewheeling, unconcerned about “the book” and details, delegates details very freely with little follow-up. Focused on the overall idea or “big picture” rather than the details. A casual risk-taker, not interested in advance planning, takes things as they come and adapts. Comfortable with ambiguity. Persistent, won’t take no for an answer.



### Both High

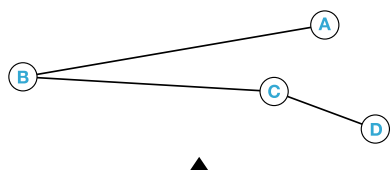
Patient, stable and easygoing. Aptitude for detail somewhat better than average. Moderately concerned about “the book” but adaptable to change. Doesn’t rock the boat. Tolerant with people and routines.

## Higher D/Lower C



### Both Low

While they prefer not to handle details and will delegate them when possible, they will handle some details if the job requires it, and will follow up on delegated assignments. Although very independent (Low D in combination with the High A in this case), they are able to adjust to corporate standards, values and adhere to rules to a degree sufficient for most organizations.



### Both High

Accurate, thorough, methodical, stable, careful and conscientious. Concerned with the quality of work and correctness in terms of rules and standards. Depends on proven methods and accepted principles, respects authority. Conservative, cautious, prudent. Very reluctant to delegate details. Detailed and talkative in communication.

# Workplace Behaviors for Factor Combinations

## A:B TASK OR PEOPLE ORIENTED

### A>B Task Oriented

- **Communicating:** Direct to the point, blunt under pressure
- **Delegating Authority:** Tightly held, find it hard
- **Problem Solving:** Creative solutions, “heads down” analytical
- **Decision Making:** Individual, “decide and announce”

### B>A People Oriented

- **Communicating:** Empathetic, social
- **Delegating Authority:** Sharing, delegates easily
- **Problem Solving:** Collaborative, talks it through with others
- **Decision Making:** Consensus, people focused

## A:C PROACTIVE OR RESPONSIVE

### A>C Proactive

- **Responding to Pressure:** Thrive under pressure, positive response
- **Adjusting/Adapting to Change:** Adapt easily, a change agent
- **Taking Action:** Decisive, proactive
- **Listening:** Sparingly, finds it difficult

### C>A Responsive

- **Responding to Pressure:** Tentative, with caution
- **Adjusting/Adapting to Change:** Takes time, needs to understand why
- **Taking Action:** Carefully, responsively
- **Listening:** Listens well, thoroughly

## A:D COMFORTABLE OR CAUTIOUS WITH RISK

### A>D Comfortable with Risk

- **Perception of Risk:** Risk = Opportunity, bring it on, it's fun!
- **Decision Making:** Quickly, easily
- **Need for Rules and Processes:** Minimal, rules are just "suggestions"
- **Generalist vs. Specialist:** Generalist

### D>A Cautious with Risk

- **Perception of Risk:** Wants to mitigate/protect, worrisome
- **Decision Making:** Carefully, cautiously
- **Need for Rules and Processes:** Strong need, needs clarity around rules
- **Generalist vs. Specialist:** Specialist

## B:C QUICK TO CONNECT OR TAKES TIME TO CONNECT

### B>C Quick to Connect

- **Connecting with Others:** Builds relationships quickly, wants to persuade people to see their view
- **Communicating:** Enthusiastic communicator, listens to preserve the relationship, but... get to the point
- **Working in Groups:** Consensus builders, motivates other group members

### C>B Takes Time to Connect

- **Connecting with Others:** Reserved, relationships build over time
- **Communicating:** Thoughtful, needs time to process before speaking
- **Working in Groups:** Reserved, may not surface their ideas openly, time to analyze

## B:D INFORMAL OR FORMAL

### B>D Informal

- **Providing Direction:** Big picture, talks at a high level in general terms
- **Sharing Ideas:** No filter – shares everything that comes to mind, processes out loud, ideas not fully baked
- **Delegating:** Delegates details easily, quick to trust

### D>B Formal

- **Providing Direction:** Very detailed instructions, does it the “correct” way (their interpretation of correct)
- **Sharing Ideas:** Selective in what they share, analytical, factual
- **Delegating:** Provides a lot of structure, takes time to trust

## C:D CASUAL OR CAREFUL WITH RULES

### C>D Casual with Rules

- **Following or Enforcing Rules:** Rules are general guidelines; patient, relaxed approach
- **Working with Structure:** Structure is a guide, comfortable with ambiguity
- **Dealing with Deadlines:** Deadlines are negotiable; persistent, may not hit deadline – sticks with it until result is achieved

### D>C Careful with Rules

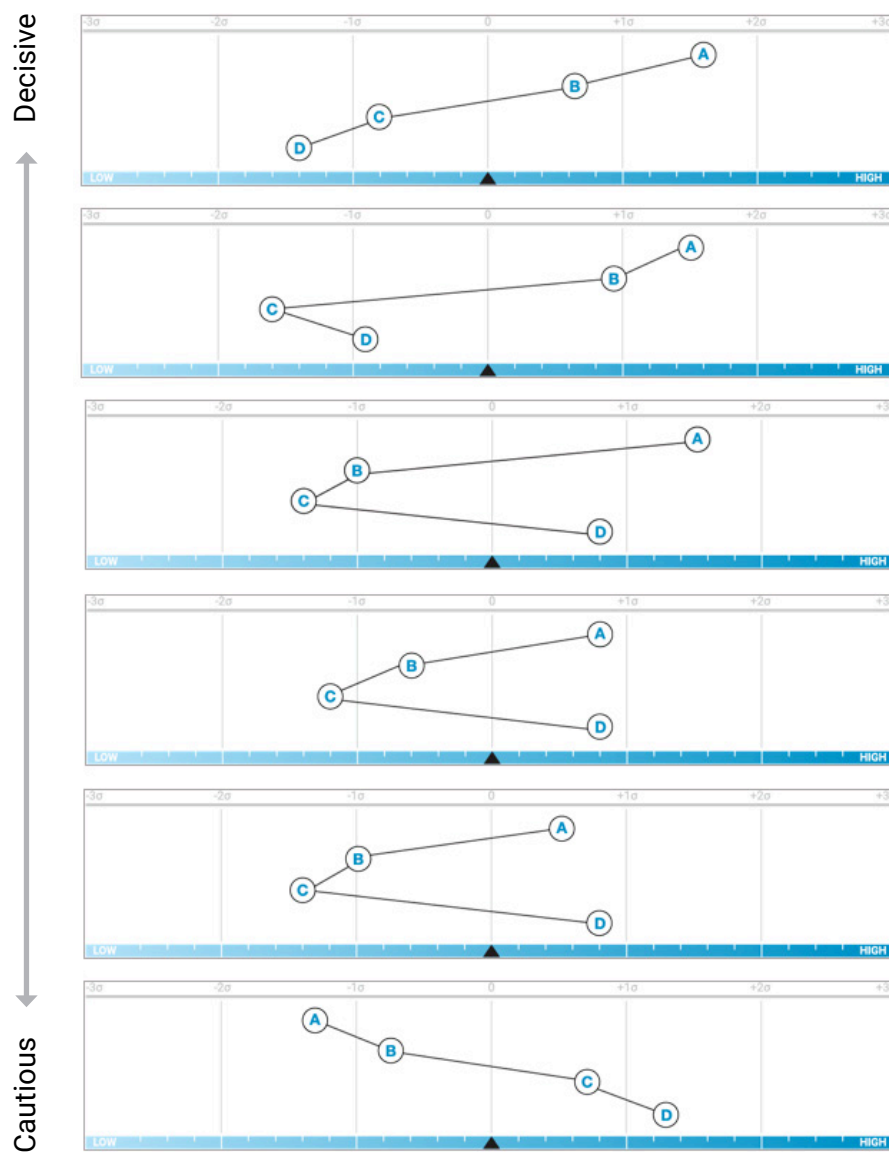
- **Following or Enforcing Rules:** Rules are here to be followed, literal interpretation of information
- **Working with Structure:** Comfortable with clarity, will work within a structure
- **Dealing with Deadlines:** Deadlines are rigid; strict with punctuality and will be accurate



# The A:D Relationship: Taking Risks and Making Decisions

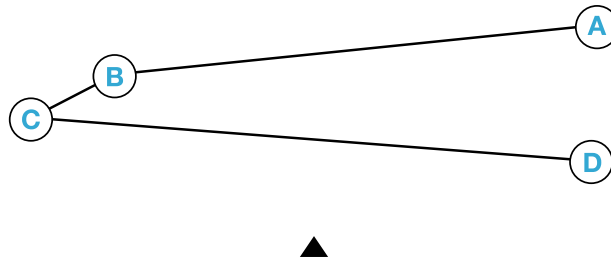
The A:D Factor Combination provides important information regarding an individual's willingness to take risks.

In the following series of patterns, note the behavior descriptions in the continuum of the A:D relationship:





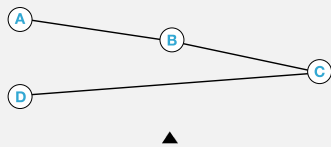
# Situation A=D



When an individual's Factor A and Factor D positions are equal or nearly equal, he or she may experience "competing drives" that make decision making more deliberate.

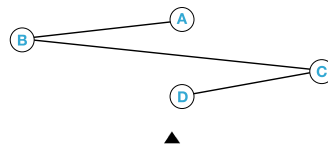
An individual with an A = D Factor Combination will likely demonstrate a thorough decision-making style. He or she will often experience a drive to analyze the complexities of the decision and a simultaneous need to get it done. Because the A and D are equal and opposing drives, they conflict with each other and may cause a buildup of tension within the individual.

## A=D Variations



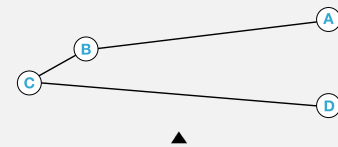
### A = D – Both Low

Low drive to control the decision and low drive to get it right; very little build-up of tension.



### A = D – Both Low , Near the Average

Moderate drive to control the decision and moderate drive to do it right; moderate build-up of tension.



### A = D – Both High

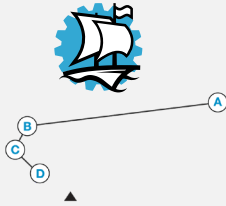
High drive to control the decision and high drive to do it right; may result in high build-up of tension.

# Reference Profiles

- Reference Profiles provide a quick and easy way to communicate the characteristics of a group of people who have similar drives.
- Reference Profiles are not a substitute for a full PI interpretation by a PI Practitioner or power user, as they do not provide the full depth of information provided by the PI behavioral pattern. However, they are a helpful way to communicate results more broadly within your organization.
- While the possible number of combinations and variations of the four Primary Factors in patterns is extremely large (millions), there is a set of 17 Reference Profiles that provide a particularly useful first approach to the analysis of PI patterns.

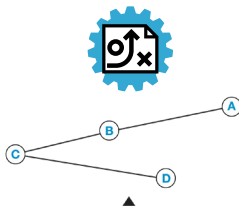
# Analytical Profiles – A > B, Low C

## Venturer



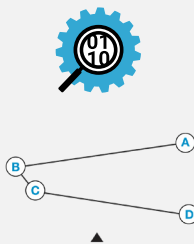
- Self-starter, self-motivator, takes initiative
- Results and goal oriented, fast, intense
- Independent generalist, freedom from structure
- Venturesome, risk-taker, authoritative, telling
- New ideas, new technologies, innovation
- Will delegate details but not authority
- Creative problem-solver, troubleshooter

## Strategist



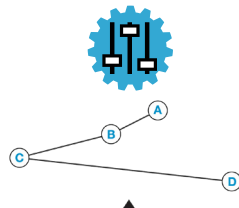
- Results oriented
- Innovative, drive for change, calculated risk-taker
- Self-starter, self-motivator, initiative
- Analytical, critical, creative thinking
- Delegates details more than authority, tight with both
- Controlling, tough on people, hard push for exacting results
- High standards, high-quality work, expert

## Analyzer



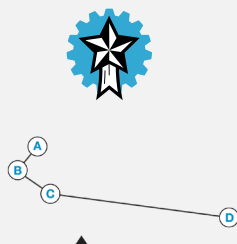
- Tense, moves quickly
- Demanding of self and others
- Exacting in setting standards of performance
- Intensely analytical, thorough, and disciplined
- Reserved in communication, skeptical, calculating
- Risk-averse, wants all the answers before taking action
- “Second-guesses” decisions, sees how everything is connected
- High-quality detail work; tight delegation, strong follow-up

## Controller



- Specialist, needs strong structure, adheres to the rules
- High-quality detail work; very tight delegation, strong follow-up
- Loyal, conscientious, cautious, conservative
- Does things fast and right, very efficient
- Expert in technical specialty
- Best with systems, concepts, things; dislikes change
- Brusque, critical, telling

## Specialist



- Needs strong structure, adheres to the rules
- High-precision, high-quality detail work
- Respects authority
- Reserved, analytical, introspective
- Serious, skeptical
- Sincere, factual, cautious communication style
- Does things right and fast, very efficient
- Prefers specifics over ambiguity

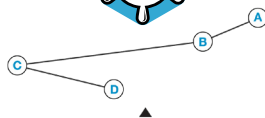
# Socially Driven Profiles – High B

## Maverick



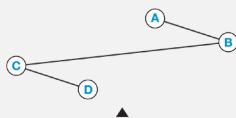
- Innovative, “outside the box” thinker
- Venturesome, risk-taker
- Animated, direct, telling
- Quick to act, driving
- Needs freedom from rules and control
- Freely delegates with loose follow-up

## Captain



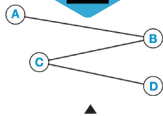
- Problem-solver, likes change and innovation
- Venturesome, risk-taker, confident, self-starter
- Results oriented, fast, intense, impatient
- Drive to control big picture, wants others to buy into his/her ideas
- Authoritative, telling, diplomatic
- Best with systems, effective with people

## Persuader



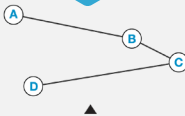
- Warmth, charm, social poise and skill
- Persuasive selling style
- Team-builder and organization developer
- Generalist, needs freedom from structure
- Venturesome, risk-taker, rallies other people around their goals
- Goal and results-oriented, delegates authority and details
- Self-confident, strong ego, initiative

## Altruist



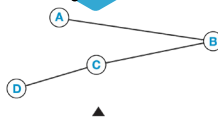
- Needs structure and adheres to the rules
- Cooperative, collaborative, congenial; receptive to input
- Asks, “What can I do to help you?”
- Dislikes risk, positive response to pressure
- Empathetic, extraverted, enthusiastic selling
- Fast, intense, efficient, precise detail follow-up

## Collaborator



- Warm, friendly, lively, extraverted, easygoing
- Willing team player; helpful, understanding, good listener
- Patient, steady, negative response to pressure
- Most effective with the familiar
- Uncritical, accommodating, accepting; cautious, dislikes risk
- Average detail follow-through

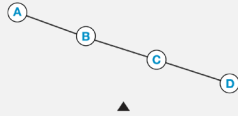
## Promoter



- Complete extravert, warm, friendly, casual, uninhibited
- Persuasive selling, empathetic, communicates verbally and often
- Sells intangibles, little emphasis on facts or details
- Effective with groups
- Delegates authority and details, little follow-up
- Won't take no for an answer

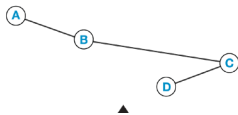
# Stabilizing Profiles – Low A, B with High C, D

## Guardian



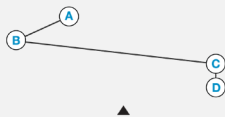
- Skillful detail work, precise, wants to do the right thing
- Needs strong structure; adheres to the rules
- Respects and seeks direction; needs a plan to follow based on professional experience, trusted advisors, or management
- Works harmoniously with the group, helps others, unselfish, approachable
- Shy with strangers, opens up in familiar circumstances
- Patient, steady, high tolerance for repetitive work

## Operator



- Steady, patient, relaxed, warm and approachable
- Best with unchanging environment; high tolerance for systematic/repetitive work
- Learns by repetition
- Affable, patient listener
- Respects and seeks direction; needs a plan to follow based on professional experience, trusted advisors, or management
- Eager to do what is expected, conscientious
- Better than average detail work

## Artisan



- Produces highly precise, accurate work
- Needs strong structure and to adhere to the rules
- Respects and seeks direction; needs a plan to follow based on professional experience, trusted advisors, or management
- Unselfish, accommodating
- Sensitive to criticism
- Straightforward, factual, calls it as he/she sees it
- Analytical thinking
- Stable, calm and deliberate

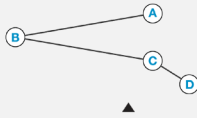
## Adapter



- Bridge-builder
- Empathetic
- Versatile, flexible
- Adapts to situations easily

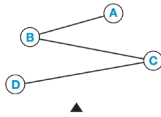
# Persistent Profiles – A > B, High C

## Scholar



- Thorough, accurate, careful, precise
- Reserved, introspective, imaginative, analytical
- High level of technical expertise
- Needs structure, adheres to the rules
- Authoritative, telling
- Patient, consistent, methodical; tight delegation, strong follow-up
- Independent, self-reliant

## Individualist



- Highly independent generalist
- Resists structure and authority
- Big picture, little interest in details
- Venturesome, risk-taker
- Goal and results oriented
- Authoritative, telling
- Persistent, does things his/her own way
- Steady, agreeable

# Self-Concept Change Guidelines

	If LOWER in Self-Concept “You perceive a need to be...” “You are trying to be...” “You feel a need to be...”	If HIGHER in Self-Concept “You perceive a need to be...” “You are trying to be...” “You feel a need to be...”
<b>Factor A Dominance</b>	<ul style="list-style-type: none"> <li>• Less independent and individualistic</li> <li>• More agreeable and cooperative</li> <li>• Less dominant and assertive</li> <li>• More cautious</li> <li>• Less venturesome</li> <li>• More of a team player</li> </ul>	<ul style="list-style-type: none"> <li>• More independent</li> <li>• More of a self-starter</li> <li>• More risk-tolerant</li> <li>• More assertive</li> <li>• More conceptual in thinking</li> <li>• Less focused on the needs of others</li> <li>• Less cautious</li> </ul>
<b>Factor B Extraversion</b>	<ul style="list-style-type: none"> <li>• More concerned with technical aspects of the job</li> <li>• More factual in expression</li> <li>• More reserved and introspective</li> <li>• More thoughtful and analytical</li> <li>• Less talkative</li> <li>• Less outgoing</li> </ul>	<ul style="list-style-type: none"> <li>• More outgoing</li> <li>• More persuasive</li> <li>• More inclusive with others</li> <li>• More stimulating</li> <li>• More open in communication</li> <li>• Less reserved</li> <li>• Less introspective</li> </ul>
<b>Factor C Patience</b>	<ul style="list-style-type: none"> <li>• More intense, driving</li> <li>• More urgent</li> <li>• More fast-paced for self and others</li> <li>• More involved with variety</li> <li>• More adaptive to change</li> <li>• Faster when producing results</li> <li>• More demanding on self and others</li> <li>• Faster than preferred or comfortable</li> </ul>	<ul style="list-style-type: none"> <li>• More patient</li> <li>• More accepting of repetitive work</li> <li>• More methodical</li> <li>• More tolerant of others taking the initiative</li> <li>• More patient with the pace of group activities</li> <li>• Less intense</li> <li>• More steady and relaxed</li> </ul>
<b>Factor D Formality</b>	<ul style="list-style-type: none"> <li>• More flexible</li> <li>• Less formal in dealing with work and other people</li> <li>• More venturesome</li> <li>• More risk-tolerant</li> <li>• Less reliant on rules and structure</li> <li>• More comfortable with fewer guidelines</li> </ul>	<ul style="list-style-type: none"> <li>• More thorough</li> <li>• More detailed and stronger in follow-up</li> <li>• More accepting of rules and structure</li> <li>• More cautious in decision-making</li> <li>• Less tolerant of mistakes</li> <li>• More attentive to accuracy and detail</li> </ul>

# Factor M

- The Factor M score represents the number of stimulus items (checklist words) an individual selected when completing the PI Behavioral Assessment.
- In the Self and Self-Concept behavioral patterns, the M score is the number of checklist items selected in each of the respective sections of the PI Behavioral Assessment. In the Synthesis pattern, the M score is the combined total number of items selected from the Self and Self-Concept checklists.
- On a PI behavioral pattern, the Factor M is shown below the graph on the bottom left.
- When Self M or Self-Concept M are less than 10, it is possible that patterns can appear extremely wide and not accurately reflect the true magnitude of behavioral drives. This is because when M is below 10, the BA pattern is very sensitive to very small item differences. For example, choosing two more A words with a Self M of 7 can artificially inflate the Factor A score above 3 sigma. In reality, two additional A words do not make someone extreme. Therefore, when M is below 10 for Self or Self-Concept, extreme factor patterns should be interpreted with caution.
- A PI behavioral pattern with a Self or Self-Concept Factor M score of less than 6 or more than 80 will not provide adequate information for interpretation. Therefore, the assessment software automatically prompts the assessment taker to adjust the number of selected words to ensure these parameters are met.



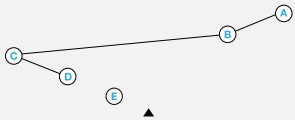
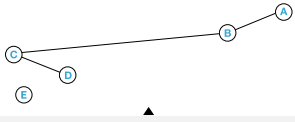
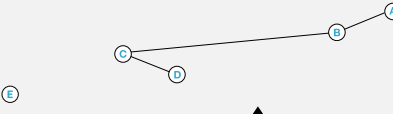
# Factor E

- Factor E measures the extent to which an individual tends to be either subjective or objective at the point of decision making.

## Tends to Be Subjective

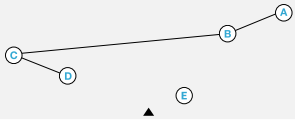
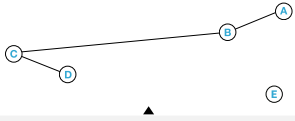
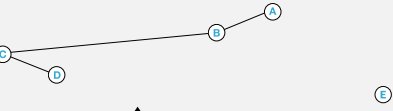
Affected by a person's particular state of mind, feelings, or temperament

(Factor E below Midpoint)

Interpretation	Subjective
Likely to be both with a slight tendency toward...	
Reflects more of a tendency toward...	
Suggests being highly predisposed toward...	

## Tends to Be Objective

Independent of the mind, factual, logical

Interpretation	Objective
Likely to be both with a slight tendency toward...	
Reflects more of a tendency toward...	
Suggests being highly predisposed toward...	

# The PI Cognitive Assessment

Although the PI Behavioral Assessment is a powerful tool, your ability to understand a candidate's potential performance does not stop there. The PI Cognitive Assessment is a quick and effective instrument which can be used to assess candidates' cognitive ability as it relates to the job. Additionally, the PI Cognitive Assessment is a better predictor of job performance, although cognitive ability, behavior, and other relevant data should be considered together when making hiring decisions.

## What is the PI Cognitive Assessment?

The PI Cognitive Assessment (CA) is a 12-minute, 50-question computerized assessment of general cognitive ability, and it is designed specifically for workforce use in occupational and organizational populations. The CA is intended to be used solely for hiring and selection decisions, following the guidance in the Administrator's Guide to the PI Cognitive Assessment. The 50 questions are delivered across 10 pages, and the candidate can answer the questions in whatever order they please until the 12-minute timer expires. The specific questions and the order in which they appear vary between administrations as a result of the CA's dynamic assessment engine.

## **What does the CA measure?**

The CA measures general cognitive ability, often referred to as “g,” which is one’s ability to adapt, solve problems, and absorb, comprehend, and process complex information. The CA makes use of three content categories (verbal, numerical, and abstract reasoning) in order to measure g.

The CA is not an IQ test or clinical instrument, and is intended strictly for use in adult working populations for talent selection purposes.

## **How effectively does the CA predict performance?**

Cognitive ability has repeatedly been demonstrated in peer-reviewed scientific journals to be the best and most powerful standalone predictor of job performance available. In addition, PI regularly conducts criterion validity studies to determine how well the CA predicts performance in client populations. When combined with other tools, such as the PI Behavioral Assessment and structured interviewing, the clients are able to better identify potential high performing candidates during the hiring process

## **How do I interpret CA scores?**

Prior to administering the CA to candidates, the hiring manager and other subject matter experts should use the PI Cognitive Job Assessment to set a target score for the job role. This score represents the level of cognitive ability required to meet the cognitive demands of the role and serves the dual purpose of easing score interpretation and reducing bias in the selection process. When candidates take the assessment, their score report will include a match score from 1-10, with 10 indicating the ideal match between the candidate's cognitive ability score and the level of cognitive ability required to perform the job.

## **Are there any accommodations available?**

There are 18-minute and 24-minute extended time formats of the CA available for candidates who require them. Other accommodations can be provided by the client, in accordance with legal requirements and company policies. PI does not recommend administering the CA to candidates who are visually impaired or who have a disability that would limit their ability to access or understand the content of the assessment.

## **What resources are available to me?**

All clients who use the PI Cognitive Assessment should read the Administrator's Guide to the PI Cognitive Assessment prior to assessing candidates. This guide details such practices as establishing an assessment policy for your organization, setting job targets and interpreting scores, and administering the assessment.

For questions regarding the development and statistical properties of the CA, we recommend starting with The Science Behind the Predictive Index Cognitive Assessment document, and, should you wish for an even deeper dive, The PI Cognitive Assessment Technical Manual. For additional questions, please reach out to your PI Certified Partner or Customer Success Manager.

# Frequently Asked Questions

**Q:** How much time should I give an assessment taker to complete the PI Behavioral or Cognitive Assessments?

**A:** The assessment taker should be given an unlimited amount of time to complete the PI Behavioral Assessment. The Cognitive Assessment is a 12-minute timed assessment with extended time options for those who require accommodations.

**Q:** How do I respond if an assessment taker asks me what the instructions of the PI Behavioral Assessment mean?

**A:** Simply state, "Read the instructions and respond accordingly."

**Q:** How do I respond if an assessment taker asks me what a specific word means?

**A:** Simply state, "If you do not know the meaning of a specific word, skip it."

**Q:** Are there right answers on the PI Behavioral Assessment?

**A:** No. There are no right or wrong answers on the PI Behavioral Assessment.

**Q:** How do I respond if an assessment taker asks me how I'm able to know the information I am reading back to them?

**A:** Respond by stating, "The Predictive Index is a scientific measurement, and I am reading back its output data."

**Q:** What do I do if an assessment taker disagrees with my statements during a readback?

**A:** If this happens, explore potential sources of the disagreement, and also look at Self-Concept changes. A PI behavioral pattern with a Self or Self-Concept Factor M score of less than 6 or more than 80 will not provide adequate information for interpretation. Therefore, the assessment software automatically prompts the assessment taker to adjust the number of selected words to ensure these parameters are met.

**Q:** Should I explain the science of the Predictive Index during a readback?

**A:** No. Conduct the readback without explaining the science behind the PI Behavioral Assessment. Avoid using PI jargon (High A, Low B, etc.) and use simple language that the survey taker will easily understand.

**Q:** What do those dots mean?

**A:** They are a graphical placement of each Factor's score on the Predictive Index Behavioral Assessment.

**Q:** What if the assessment taker asks me whether they should respond to the survey from a work or personal perspective?

**A:** Simply state, "Respond according to what you feel best represents what is expected of you."

# Contact The Predictive Index

## General Information:

- [www.predictiveindex.com](http://www.predictiveindex.com)

## Customer Service:

- PI Customer Service  
Phone: +1-781-493-7536  
Toll-Free (USA and Canada): +1-877-235-1541

## Online Resources:

- The Predictive Index Software: [www.pi.predictiveindex.com](http://www.pi.predictiveindex.com)
- Knowledge Base: [www.predictiveindex.force.com/knowledgebase](http://www.predictiveindex.force.com/knowledgebase)
- Catalyst Education: <https://predictiveindex.force.com/education/s/>

## Headquarters:

- Predictive Index  
101 Station Drive  
Westwood, MA 02090 USA  
Phone: +1-781-493-7535  
Toll-Free (USA and Canada): +1-800-832-8884  
Fax: +1-781-801-1251  
Email: [info@predictiveindex.com](mailto:info@predictiveindex.com)







**Better work, better world.**