

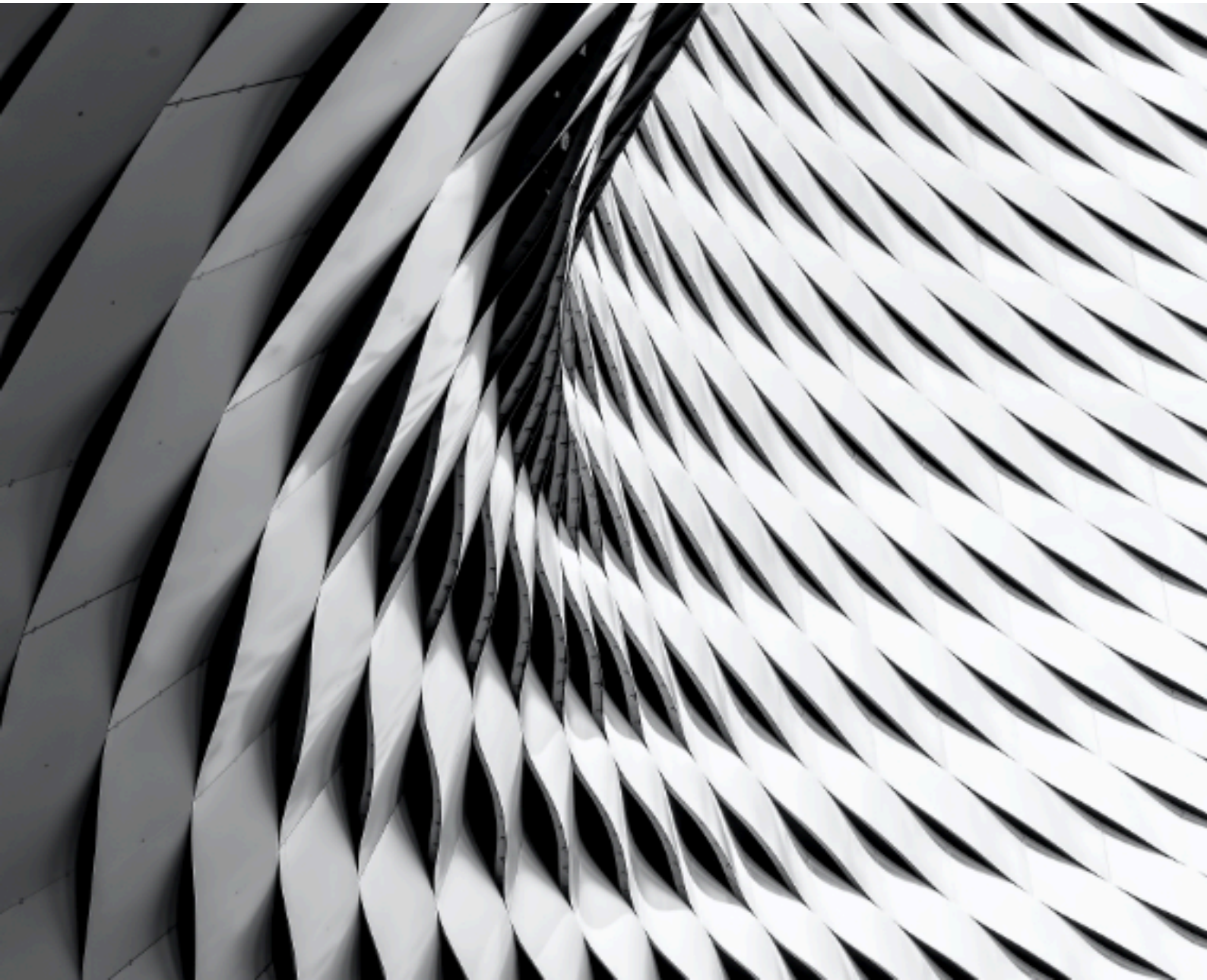


Director Investment Banking Exercise

A candidate report for:

Anonymous Candidate

Created 21st November 2023



Introduction

This report is confidential and is intended to provide you with feedback on your results.

The test is designed to assess behaviours linked to success in the role of a Director working in an Investment Bank. The competencies assessed are defined below.

Director Competencies

Purposeful Engagement: Supporting colleagues, stakeholders, & clients in an effort to improve and maximise outcomes (i.e., efficiency & quality).

1. Builds trust & confidence with colleagues, stakeholders, & clients, through personal engagement and support
2. Collaborates within & across teams (i.e. contributes fully, being as inclusive as possible)
3. Communicates clearly and confidently (i.e., being clear, precise & timely)
4. Negotiates fluently and calmly, esp. with colleagues & stakeholders

Analytical Rigour: Establishing a clear, precise & accurate understanding of situations & tasks to facilitate effective action and valid decision-making.

1. Carefully analyses situations before acting (seeking a range of perspectives)
2. Makes transparent & defensible business decisions (esp. risk-related)
3. Is proactive in search of new opportunities to maximise outcomes
4. Recognises own and others' strengths & development needs for the role

Driving Peak Performance: Routinely delivering a high quality, efficient & adaptive client-focused service.

1. Sets clear, ambitious & achievable targets for self (& others), monitoring progress & adapting as required
2. Is proactive at all times, in dealing with responsibilities & challenges, esp. delays, quality & tasks
3. Is resilient, having effective strategies for dealing with work-related pressures & setbacks
4. Maintains an organised & calm approach, esp. under pressure & managing deadlines

Role Modelling: Demonstrating a genuine commitment to company standards and best practice.

1. Demonstrates genuine, visible commitment to company values, goals & priorities
2. Demonstrates appropriate care and attention in all aspects of work (e.g., due diligence, quality, process, etc)
3. Is open & honest about own strengths & development needs (i.e., acknowledging own limitations, errors, & misjudgements, etc.)
4. Maintains the highest standards of professional conduct (in line with laws, regulations & company' principles)

How To Use This Report

This report provides you with feedback from the Director Investment Banking Exercise. It contains 'behavioural interpretation' that you can use to help you understand how you have performed on the exercise and 'development opportunities' to inform your development priorities, should you wish to improve your skills in specific areas.

Behavioural Interpretation






For each competency measured by the Director Investment Banking Exercise, an interpretation (four bullet points) has been provided to help you better understand the decisions you made on the exercise. Not every bullet point may apply equally to you, but you should consider them all, at least initially, and then decide which are most relevant for you.

Development Opportunities

You have also been provided with some ideas to help improve the competencies. The suggestions are intended to support you in your career progression, so working through these suggestions and identifying your own ideas for improving your skills should help you create a relevant development plan. When creating your development plan, it is best to set SMART Goals:

- **S = Specific:** Clearly defined and unambiguous
- **M = Measurable:** Contains specific criteria that you can use to measure your progress and goal accomplishment
- **A = Achievable:** Attainable in the timeframe you have set yourself and not impossible to achieve
- **R = Relevant:** Relevant to your goal, career or what you want to achieve
- **T = Time-bound:** Has a clear start and end date

The SMART Template below can be used to help you set a development goal.

 S	<p>Specific</p> <ul style="list-style-type: none"> • What do I want to achieve? • When do I need to achieve it? • Why is the goal important? • Who is involved? 	
 M	<p>Measurable</p> <ul style="list-style-type: none"> • How will I measure my progress? • How will I know when my goal is achieved? • What will be different when I have completed my goal? 	
 A	<p>Achievable</p> <ul style="list-style-type: none"> • Can I complete my goal in the time I have available? • How confident am I that I can achieve my goal? • What support will I need to achieve my goal? 	
 R	<p>Relevant</p> <ul style="list-style-type: none"> • Why is this goal important to me? • How does this goal relate to my overall success? • What is especially meaningful about my goal? 	
 T	<p>Time-bound</p> <ul style="list-style-type: none"> • When will I be ready to start working on my goal? • What specific date will I complete my goal? • How often will I check the progress I am making on my goal? 	

Feedback

Role Modelling

Your responses suggest that you:

- Consistently champion company values, inspiring others through your alignment with organisational objectives
- Prioritise quality and diligence in your tasks, setting a gold standard in your domain
- Lead with vulnerability, being refreshingly open about your strengths and areas for development
- Uphold and reinforce the importance of professional conduct, setting a benchmark for peers

To further hone your skills in this area, you might wish to consider:

- Hosting or leading sessions on company values, sharing your journey and practices in embodying these principles
- Engaging in advanced quality management or process optimisation projects, pushing the boundaries of excellence
- Mentoring or guiding junior team members, sharing insights on self-awareness, growth, and transparent communication
- Collaborating on initiatives to refine or enhance professional conduct standards within the organisation, sharing your experiences and insights

Purposeful Engagement

Your responses suggest that you:

- Engage with colleagues and stakeholders but can focus more on consistent personal support and authentic interactions to nurture trust
- Participate in team activities, with potential to drive more inclusive discussions and actively involve diverse perspectives
- Communicate main ideas, with opportunities to refine details and delivery for increased clarity and confidence
- Engage in negotiations with a focus on immediate concerns, and can work on broader perspectives and maintaining equanimity during discussions

To develop your skills further in this area you might wish to consider:

- Engaging in executive coaching sessions focusing on strengthening stakeholder relationships
- Initiating strategic team alignment sessions to ensure cohesive goals and objectives across departments
- Initiating feedback sessions post major announcements or meetings to understand areas of improved clarity
- Engaging in peer review sessions post-negotiations to identify areas of improvement and strategise accordingly

Analytical Rigour

Your responses suggest that you:

- May act without considering whose perspective is critical, indicating an area for development in analytical thinking
- Could benefit from refining the transparency and defensibility of your business decisions, particularly in relation to risk
- Show a reactive approach and could benefit from being more proactive in searching for new opportunities
- Have opportunities to better recognise and develop strengths and needs for yourself and others in specific roles

To develop your skills further in this area you might wish to consider:

- Engaging in critical thinking training to broaden your perspective analysis
- Participating in risk assessment seminars to deepen understanding and defensibility of decisions
- Attending strategy workshops to boost proactive identification of opportunities
- Seeking 360-degree feedback sessions to gain insights into strengths and development areas for both yourself and your team

Driving Peak Performance

Your responses suggest that you:

- Have foundational skills in target setting but may need to hone the adaptability aspect
- Show glimpses of proactivity but could benefit from a more consistent application
- Have a basic toolkit for managing pressures but can further develop your resilience
- Can maintain a degree of organisation and calm but should work on enhancing this under varied pressures

To develop your skills further in this area you might wish to consider:

- Collaborating closely with team leads or managers in refining target setting and monitoring processes
- Regularly challenging yourself with tasks outside your comfort zone to build proactivity
- Engaging in peer discussions to share and learn strategies for managing setbacks and pressures
- Practicing time-management techniques to ensure optimal organisation even in hectic situations

Contact Us:

[Viewpoint](#)

support@viewpoint-psychology.com