

# SurePeople’s Prism Psychometric Assessment & WorkforceX Employee Experience Survey

SurePeople

Best Advance in Assessment and Survey Technology

February 2023



## Company Background



Company-at-a-Glance	
Headquarters	Arlington Heights, IL (USA)
Year Founded	2015
Employees	26
Global Scale	SurePeople has customers in North America, South America, Europe and Australasia.
Customers/Output, etc. (Key customers and services offered)	Key customers using SurePeople’s assessment and survey technologies include Johns Hopkins Medicine, Boston Children’s Hospital, Vertex Pharmaceuticals, American Hospital Association, iRobot (Amazon), Texas Rangers (MLB), St. Louis Cardinals (MLB), Sirtex Medical, UMass Boston’s Center for Collaborative Leadership and Greenlight BioSciences
Industry	HCM/HR Tech/Work Tech
Website	<a href="http://www.surepeople.com">www.surepeople.com</a>

## Value Proposition

SurePeople's cloud-based platform is used by a wide range of organizations to assess, develop and optimize a modern workforce to meet the demands of the new world of work. These client organizations include Johns Hopkins Medicine, Boston Children's Hospital, iRobot (Amazon), Vertex Pharmaceuticals, UMass Boston's Center for Collaborative Leadership, the Texas Rangers (Major League Baseball Team), the St. Louis Cardinals (Major League Baseball Team), Greenlight BioSciences and the American Hospital Association, among others.

Specifically — through the platform's integrated WorkforceX employee experience survey and the Prism psychometric assessment technologies — HR and team leaders can (1) more effectively identify the precise root cause drivers of critical workforce challenges such as burnout, turnover and disengagement, and (2) address these root causes through prescriptive development solutions, personalized digital learning and online coaching tools – all available to leaders and employees on a platform and in the flow of work.

To deliver root cause analyses for HR and/or team leaders, the platform synthesizes and correlates WorkforceX employee experience survey data (about how people feel), Prism psychometric data (about who people are), and other people data through API integration with HRIS. As a result of these data-driven insights, leaders can prioritize and make targeted interventions at the individual, team, business unit and/or enterprise level, where it matters most.

SurePeople's solution addresses several major challenges and business needs. First, measuring and enhancing employee experience is a top priority for HR and business leaders today. Major disruptions over the past few years — including the pandemic, remote/hybrid work, the "Great Resignation," and the need for greater work/life flexibility — have had a profound impact on the experience of every employee.

According to many industry analysts, however, legacy approaches and "one-size-fits-all" employee experience, engagement and development initiatives have largely failed to deliver expected business outcomes — nor have these approaches significantly increased employee engagement and retention in the current environment.

By connecting employee experience survey data and psychometric assessments with precision actions and enabling technology, SurePeople's solution provides organizations with a more modernized approach to workforce measurement and personalized talent development processes that measurably enhance employee experience, engagement, retention and productivity.

Boston Children's Hospital, for example, has successfully used SurePeople's platform to synthesize and correlate employee engagement survey data, Prism psychometrics and

360-degree competency data to achieve precision insights and accelerate targeted development actions in support of mission-critical employees. As a result, the hospital was able to reduce voluntary turnover by 2.2% and saved \$2.5 million from an increase in the retention of key talent.

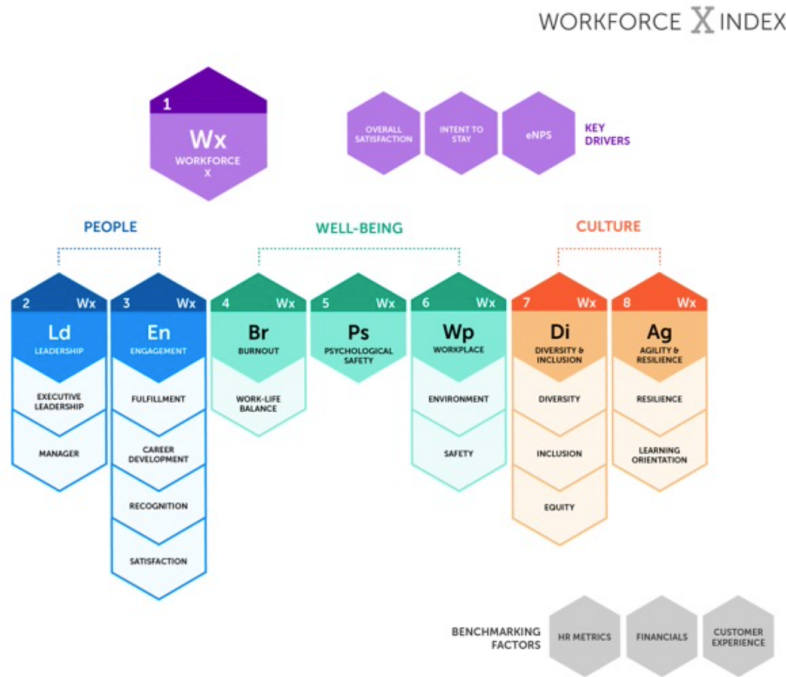
Lisa DeAngelis, Ph.D., Director of UMass Boston’s Center for Collaborative Leadership, adds: “It’s not just the fact that there is this powerful Prism assessment and employee experience survey. Rather, it’s that these technologies are in a platform that enables you to use them and take action in a variety of ways. This is a huge differentiator from the other tools that I’ve used in the marketplace.”

## **Product or Program Innovation**

SurePeople’s primary breakthrough innovation includes (1) the ability to collect, synthesize and correlate critical data sets – such as employee experience survey data and Prism psychometric data – to reveal the root cause issues impacting today’s workforce and (2) delivering targeted prescriptive development solutions based on these data-driven insights, for all three levels of the “system” simultaneously: namely, individual employees; teams/business units; and, the HR function (including Organizational Development, Talent and Learning & Development groups).

First, SurePeople’s WorkforceX employee experience survey gives HR and business leaders a comprehensive understanding of workforce sentiment across key indices critical in the new world of work. These include employee sentiment about leadership (including executive leadership and managers), employee engagement (including satisfaction and career development), burnout (including work-life balance), psychological safety, workplace (including workplace safety), diversity & inclusion (including equity) and agility & resilience (including learning).

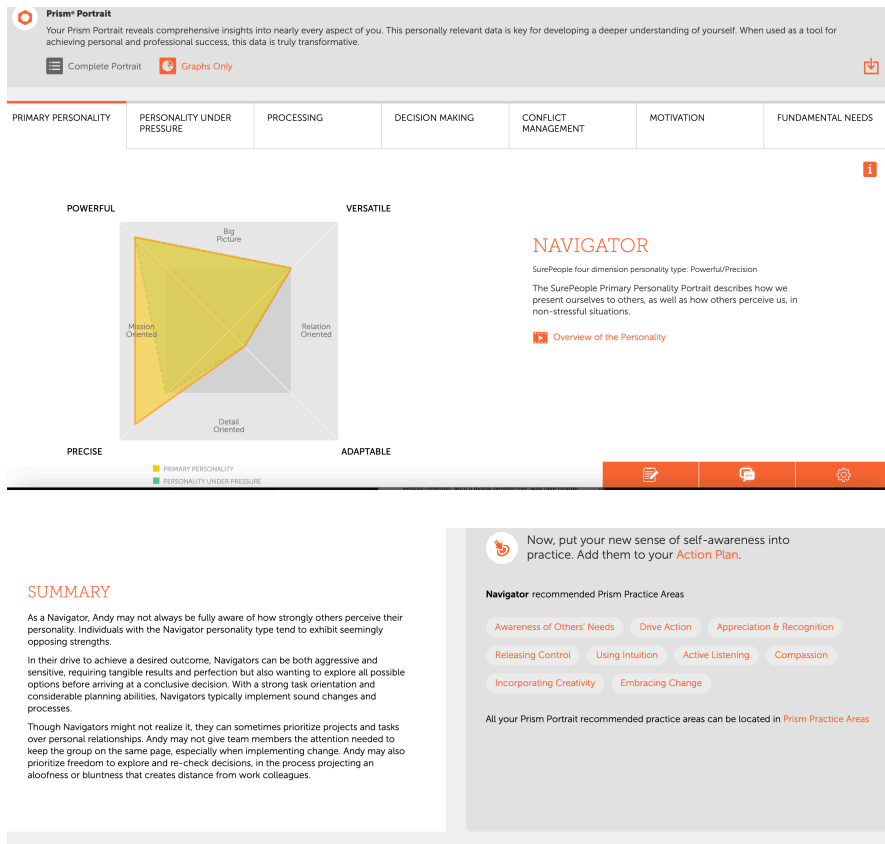
Visual Below: Indices included in the WorkforceX employee experience survey.



Next, the platform’s integrated Prism psychometric assessment measures 54 key traits and attributes across an individual employee’s Personality & Personality Under Pressure; Processing; Decision Making; Motivation; Conflict Management; and Fundamental Needs.

For the employee, this psychometric “portrait” delivers practical, actionable insights that drive self-awareness and guide personal & professional growth. Based on an individual’s Prism results, an algorithm automates prescriptive development recommendations and curates associated learning content and programs, including from top SurePeople content partners, such as Harvard Business Publishing. Employees can also build Action Plans (individual development plans) on the platform.

Visuals Below: (Fig. 1) Partial screenshot of the employee dashboard featuring the Prism psychometric portrait. (Fig. 2) Prism reports are easy-to-interpret and actionable. The platform offers employees personalized content & programs; an Emotional, Relational and Team intelligence competency model; and an individual development plan.



Chris Newell, Ph.D., Senior Director of Learning and Development at Boston Children’s Hospital observes: “I’ve been schooled in assessment tools in 30 years of doing this work. The Prism psychometric assessment was the first time I was able to see six comprehensive assessments that were informing each other, in one place. The complete Prism “portrait” is a kind of “3D view” of the whole person that I cannot easily get with any other assessment.”

Team (and/or business unit) leaders can also accelerate their understanding of their teams via their individual and aggregate Prism psychometric profiles. Digital coaching and online collaboration tools — such as Relationship Advisor and Team Advisor (see visual

below) – help leaders and managers improve team communication, build psychological safety, strengthen relationships and increase team productivity.

Visual Below: Partial screenshot of the “Relationship Advisor” tool for two colleagues, “Andy” and “Brandon.” Relationship Advisor provides practical coaching and collaboration recommendations (in the flow of work), based on each individual’s Prism psychometric data. The Team Advisor tool allows the same for teams or larger cohorts.

PRIMARY PERSONALITY (NAVIGATOR)	PERSONALITY UNDER PRESSURE (VISIONARY)	PRIMARY PERSONALITY (SCIENTIST)	PERSONALITY UNDER PRESSURE (ARCHITECT)
<p>Andy can be both assertive and sensitive when trying to achieve a desired outcome. As a Navigator, Andy desires tangible results and implements sound, procedural methods to attain them. Navigators like to implement practical changes and have the ability to plan considerably. Andy is naturally cautious, which proves beneficial when exploring and analyzing decisions and works well when given a certain measure of freedom to do so.</p> <p><b>ANDY SHOULD MAKE AN EFFORT TO:</b></p> <ul style="list-style-type: none"> <li>• Be less controlling and give Brandon freedom and space</li> <li>• Express admiration for Brandon's accomplishments</li> <li>• Strive for win-win situations</li> <li>• Be open-minded and less insistent on having things a certain way</li> <li>• Realize that being both quick and slow to make decisions frustrates Brandon</li> <li>• Take calculated risks and make quicker decisions</li> <li>• Speak in terms of goals and objectives</li> <li>• Let Brandon lead tasks and projects that are important to him</li> <li>• Show appreciation for Brandon's commitment to get things done</li> <li>• Realize that Brandon may feel Andy is bogging down the process with unnecessary details</li> </ul> <p><b>ANDY SHOULD AVOID:</b></p> <ul style="list-style-type: none"> <li>• Being very territorial</li> <li>• Intimidating or overwhelming Brandon</li> <li>• Getting into power struggles</li> <li>• Thinking that Brandon slows down the process with technicalities or excessive concerns</li> <li>• Perceiving Brandon as pessimistic and unwilling to try new things</li> <li>• Feeling a loss of control when Brandon's perfectionism slows things down</li> </ul>		<p>Brandon is exceptionally detail-oriented and analytical. As a Scientist, Brandon has a strong need to get things just right and remains highly focused on that goal. Brandon possesses a natural desire to think critically and act based on correctness, accuracy and well-researched facts. This approach has a strong impact on the Scientist's decision-making process, as they seek accuracy and logic and will explore all possible options before arriving at a conclusive decision. Brandon has a very strong task orientation and prefers a peaceful work environment. Additionally, Brandon desires to be conscientious and principled is well-intentioned and can positively impact the work environment.</p> <p><b>BRANDON SHOULD MAKE AN EFFORT TO:</b></p> <ul style="list-style-type: none"> <li>• Be aware that details Brandon finds important may not be to Andy</li> <li>• Take calculated risks and make quicker decisions</li> <li>• Be direct and to the point</li> <li>• Agree with Andy's ideas when possible, encouraging his use of logic</li> <li>• Speak in terms of goals and objectives</li> <li>• Let Andy lead tasks and projects that are important to him</li> <li>• Show appreciation for Andy's commitment to get things done</li> <li>• Realize that Andy may feel Brandon is bogging down the process with unnecessary details</li> <li>• Be factual and objective, but flexible</li> <li>• Try to understand how Andy might see the situation differently</li> <li>• Affirm the quality of Andy's work</li> <li>• Offer explanations in a diplomatic manner</li> <li>• Handle criticism objectively</li> <li>• Realize that Andy wants to get things right as well</li> <li>• Focus on excellence, not perfection</li> </ul> <p><b>BRANDON SHOULD</b></p>	

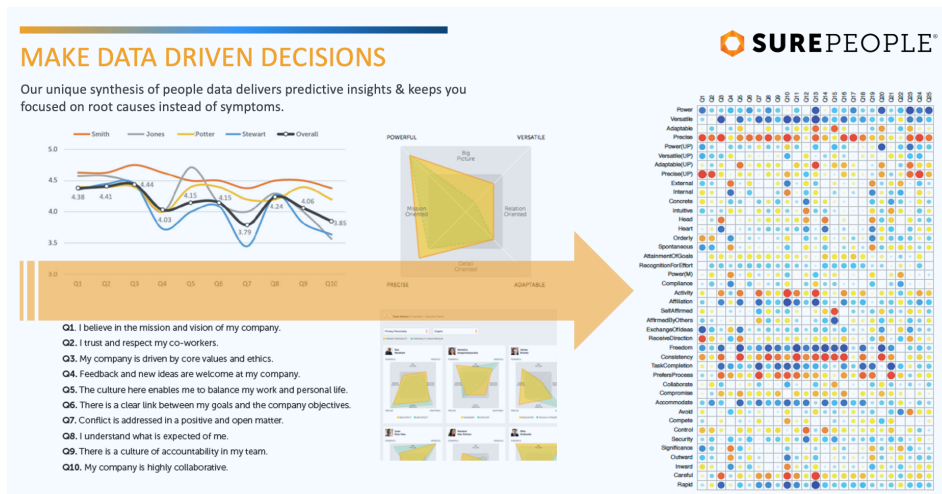
Finally, SurePeople’s proprietary A.I. models synthesize and correlate WorkforceX survey results, Prism psychometric data and other people data to identify the root cause drivers of common workforce challenges, such as turnover, burnout and disengagement.

HR and business leaders receive predictive insights and prescriptive development actions to prioritize interventions at the individual, team, business unit and/or enterprise level.

## Unique Differentiators

The SurePeople platform’s unique differentiators include:

1. The ability to combine employee experience data (how people feel), psychometrics (who people are) and additional people data, such as HRIS data;
2. The ability to synthesize and correlate these data sets to reveal root causes, generate predictive insights and help HR and business leaders prioritize targeted interventions where most needed; and,
3. The ability to translate these insights into actionable prescriptive development solutions, personalized content and data-driven online tools for individuals, teams, business units and/or the enterprise — all on a platform and at scale.



As a result, SurePeople offers its client organizations an “all-in-one” platform for assessing, developing and optimizing a modern workforce:

**Assess** — HR and business leaders gain a deeper understanding of their workforce by measuring how people feel (WorkforceX) and who people are (Prism) and addressing root causes rather than treating symptoms.

**Develop** — The survey and assessment data empower leaders and managers at all organizational levels with personalized, science-driven development. The platform’s patented software automates prescriptive development recommendations based on individuals’ unique Prism results and curates premium learning content and programs, including from world-class content partners such as Harvard Business Publishing.

Further, the platform’s data-driven leadership development journeys include an integrated Emotional, Relational and Team intelligence (“ERT-i”) behavioral model — a critical set of leadership behaviors and capabilities proven to decrease turnover, reduce burnout and improve employee satisfaction.

Optimize — Finally, HR and team leaders are equipped with a complete toolkit for leading and managing in-house, remote and hybrid teams. Leaders accelerate their understanding of their teams via their individual and aggregate Prism psychometric profiles. Digital coaching and collaboration tools — such as Relationship Advisor and Team Advisor (see screenshots in the Product Innovation section) —help managers improve communication, build psychological safety, strengthen relationships and increase team productivity in the flow of work.

Chris Newell, Ph.D., Senior Director of Learning and Development at Boston Children’s Hospital confirms: “I can go to a team that has taken Prism and immediately have conversations about the makeup of that team, including the team’s strengths and blind spots, how balanced or unbalanced that team is and how to optimize that team’s composition or development for performance.”



## About Brandon Hall Group

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

### Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

### Membership

Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

SOME WAYS WE CAN HELP

### Excellence Awards

Two annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

### Advisory Offerings

Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.

#### ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM

recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

#### SMARTCHOICE® PREFERRED PROVIDER PROGRAM

uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.