Persona Methodology Brief

Persona is a behavioral self-assessment. This brief explains what it measures, how it is scored, what the two report types are for, and its scope and limitations.

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1. Why this exists

Whenever a behavioral self-assessment informs a people decision, three questions follow it into the room: *What does the instrument actually measure? How is a single number derived from the answers? And what weight should the number be allowed to carry?* This brief answers those questions for Persona, the behavioral self-report instrument that sits alongside the Assessment Center observed assessment and the Reflect 360 multi-rater view.

Persona is a self-report screening and development signal. It is deliberately not a hiring decision and not an objective measure of ability. The design choices documented below all flow from that single positioning.

2. What Persona measures

One framework, many instruments

Persona is a behavioral self-report across the VIFM competency framework. A respondent rates a series of first-person statements about how they typically work, and those ratings roll up to a profile across the framework. Crucially, it is the *same* competency framework that Reflect 360 uses, so a person's self-view and their others-view are expressed on identical dimensions and can be read side by side without translation.

The competency framework

The framework is organized as **21 competencies grouped into 8 clusters** (framework v2, active since 27 September 2026), which in turn sit under the four VIFM behavioral domains (Thinking, Results, People, Self). The eight clusters are:

- Strategic and Commercial Reasoning
- Customer and Stakeholder Focus
- Delivery and Execution
- Innovation and Complexity
- Influence and Communication
- Leading and Developing Others
- Integrity and Character
- Growth and Personal Effectiveness

Each competency carries at least four first-person Likert statements in the Persona item bank, authored in English and Gulf-appropriate Arabic. As of 17 November 2026, 286 statements are in service, with at least four for every competency. A completed sitting records the framework version it was scored on and the exact statements it served, so a later framework change never re-scores an existing report. The framework's behavioral indicators and rating-scale anchors have been through an expert review, the outcome of which was loaded to the platform on 10 November 2026. The Arabic names and definitions of the competencies remain pending human review (see §8). Any further change to the set of competencies is issued as a new framework version in the same way.

Why it maps to Reflect 360

Self-report alone is one source. By anchoring Persona to the framework that Reflect 360 already uses, a self-rating on any competency lines up exactly with the manager, peer and direct-report ratings on the same competency. The intended end state is a self-versus-others read on one set of axes - the self view from Persona, the others view from Reflect 360 - which is far more defensible than either source on its own.

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3. How it is scored

Item formats

A sitting is served in one of three formats, chosen when the sitting is set up: rated statements only, forced choice only, or both. Both is the default.

- **Rated statements (normative).** The respondent rates each statement on a five-point agreement scale. On the voucher and standalone routes, all statements are presented in one randomized order with the competency and cluster names hidden, so a respondent cannot see which competency a statement belongs to. The order is fixed for the sitting, so it can be reconstructed afterwards. When Persona is taken as part of an assessment engagement, the rated statements are presented cluster by cluster under their competency names.
- **Forced choice (ipsative).** Statements are presented in sets of up to four, each statement in a set drawn from a different competency. In every set the respondent marks the one statement that is most like them and the one that is least like them. Only positively worded statements are used, up to two per competency.

The item response

Every rated Persona statement is answered on a 5-point scale, from 1 (Strongly disagree) to 5 (Strongly agree). Each statement is keyed to exactly one competency. Statements written in the negative direction are marked as reverse items; a reverse item's answer is subtracted from 6 before it contributes to a score (a 5 becomes a 1, a 4 becomes a 2), so a high score always means more of the competency regardless of how the statement was phrased.

From items to a competency score

A competency's self-score is the mean of its (reverse-mapped) item scores, on the same 1-5 scale, rounded to two decimal places. Because every competency is measured by several statements (at least four) rather than one, the per-competency score is less sensitive to a single misunderstood response.

When a sitting includes the forced-choice section, each competency also receives one forced-choice value on the same 1-5 scale. The value starts at the midpoint of 3, rises by one for each set in which the competency's statement is chosen as most like the respondent, falls by one for each set in which it is chosen as least like the respondent, and is kept within 1 to 5. That single value is averaged together with the competency's rated statements, so in the default format it counts as one further item. In a forced-choice-only sitting, the forced-choice value is the competency score. A set that does not contain exactly one "most" and one "least" choice contributes nothing.

From competencies to clusters and overall

Cluster averages are the mean of the competency scores within each cluster, and the overall self-rating is the mean across all answered competencies. Each competency, cluster and overall score is interpreted against the five Persona interpretation bands:

1. **Exceptional** (4.5 and above) - a clear, distinctive strength to share and teach.
2. **Proficient** (3.5 to 4.49) - solid, with room to deepen mastery and extend impact.
3. **Developing** (2.5 to 3.49) - emerging; structured coaching, practice and stretch assignments help.
4. **Requires Focus** (1.5 to 2.49) - a significant gap to prioritize with a formal development plan.
5. **Critical Focus** (below 1.5) - urgent; immediate development action and close support are essential.

The band names describe the level of the self-rating. They are not a finding about demonstrated performance, which requires corroboration from a Reflect 360, an interview or work evidence. The same applies to the role-fit bands and the indicative readiness label described below.

Role fit (when a target role is bound)

When a Persona sitting is bound to a target role profile, Persona computes a weighted role-fit percentage. Each role competency carries a target proficiency (1-5) and a relative weight. Where a role competency has no target of its own, the role profile's default target is used, and where it has no weight, a weight of 1 is used.

For each role competency, the self-score is divided by the target and capped at 1, so exceeding the target on one competency cannot offset a shortfall on another. Each result is multiplied by the competency's weight. The weighted results are added, divided by the sum of the weights, and

expressed as a whole-number percentage from 0 to 100. Fit resolves into three bands: **Strong fit** (80% and above), **Moderate fit** (60-79%), and **Limited fit** (below 60%).

On a hiring report, the fit band is accompanied by an indicative readiness label that uses the same boundaries: **Ready** (80% and above), **Ready with Development** (60-79%) and **Not Ready** (below 60%). The report marks the label as indicative, because it rests on self-report alone, and asks the reader to corroborate it before deciding.

The competencies with the largest weighted shortfall (target minus self-score, multiplied by weight) are listed first, so a reader sees where the self-profile falls short of the role. The self-rated strengths (self-score at or above target) are listed alongside them. The role profile is recorded as it stood when the sitting started, so a later edit to the role profile does not change a completed report (sittings that predate this record are read against the current role profile).

Persona reports one role-fit figure, and missing data is treated as follows:

- **Fit is computed over measured competencies only.** A scoped sitting may serve a subset of the role's competencies; the fit is computed across the competencies actually answered. A role competency with no self-score in the sitting is left out of both the weighted total and the sum of the weights, so it neither raises nor lowers the percentage. Counting an unserved competency as a zero would understate fit, so the calculation excludes it.
- **Coverage is disclosed.** When fewer competencies were measured than the role requires, the English PDF report states how many of the role's competencies the fit was measured on and asks the reader to treat it as a partial signal. The Arabic PDF and the on-screen administrator views do not yet carry this note, so there the percentage should be read with the scope of the sitting in mind.
- **A self-score is never invented.** A required competency that was not measured is never given an assumed score, and it is not listed among the gaps or the strengths. The underlying calculation can also produce a more conservative reading, in which a required but unmeasured competency keeps its weight and contributes zero (a role asks for it and there is no signal). Persona's reports do not use that reading: they use the measured-only figure and disclose coverage.

Percentile context

Persona is designed to carry percentile context - "this self-profile sits at the Nth percentile of comparable respondents" - once a comparison (norm) group of sufficient size has accumulated. A percentile is shown only when the comparison group is established and has at least 200 people for each competency; otherwise no percentile is shown. As of 16 November 2026, no comparison group is loaded, so no percentile is printed. Until a comparison group meets that standard, scores are interpreted against the absolute interpretation bands above, not against a peer distribution. This mirrors the platform-wide rule that percentile claims wait for the data that earns them.

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4. The two report types

A Persona sitting is run for one of two purposes, and the purpose changes what the report says and how it is framed. The same underlying self-profile drives both; the framing differs. Further reports can

be produced from the same sitting (the Persona Leadership Report, the DARE Decision-Role Profile and the Emotional Intelligence Profile). Each has its own methodology document.

Hiring - a role-benchmarked screening signal

A hiring report reads the self-profile against a target role as a screening signal that supports a human decision. It shows the role-fit percentage and band, the biggest gaps against the role target, and the strengths to leverage. Competencies whose weight is at or above the middle weight for the role are marked as role-critical. A role-critical competency among the largest gaps that is self-rated in the two lowest bands, or at least 1.5 points below its target, is listed as a watch area: a prompt to probe at interview, not a reason to reject. The per-competency narratives are deliberately written in self-report language - they describe what the candidate's own answers indicate, relative to the role target, as something to corroborate rather than a verdict. The narratives can be drafted by AI (grounded strictly in the pattern of the candidate's own answers - which statements they rated higher versus lower) and fall back to a deterministic, defensible narrative when AI is unavailable, so the report always renders the same evidence-anchored read. An AI-drafted narrative that uses strength language for a score clearly below the role target is discarded and replaced by the deterministic narrative.

The hiring report is built to feed, not replace, the human stage. It is accompanied by a structured interview guide (so an interviewer can probe the gaps the self-profile raises with concrete behavioral questions) and a decision-integration worksheet (so the screening signal is recorded alongside interview and work evidence rather than standing alone). The report's own caption states the rule plainly: this is a screening signal, not a hiring decision, to be corroborated with a structured interview and work evidence.

Hiring reports are access-controlled. Because a hiring report is a client and recruiter deliverable about a candidate, it can be retrieved only by an authenticated VIFM administrator, or by an authorized client manager for a sitting that belongs to their own organization. A candidate who reaches the assessment via a voucher or link - and therefore has no account - cannot retrieve their own fit report, even if they know its address.

Development - a growth plan the person acts on

A development report is framed entirely as growth. It presents a holistic narrative across the clusters, the self-profile against the role target as "current alignment" (with development priorities and strengths to build on rather than gaps to be judged on), a development-planning scaffold, and coaching prompts. Where no target role is bound, the development priorities are the lowest self-ratings below a reference level of 4 on the 1-5 scale. Each per-competency note is forward-looking - what to build on and one concrete way to grow it (a stretch assignment, mentoring, or structured learning) - never a verdict.

The development report links diagnosis to delivery with a VIFM Academy course plan: the competency gaps are turned into a ranked list of VIFM programs, each tagged with how strongly it targets the priority and with a high-fit marker on the strongest matches.

Development reports are released through the organization. On the current platform the development report is retrieved in the same controlled way as the hiring report: by an authenticated VIFM administrator, or by an authorized client manager for their own organization. A respondent who takes Persona through a voucher or link sees a confirmation that the responses were submitted, not the

results. A candidate who takes Persona as part of an assessment engagement sees a summary of their own self-profile (overall, cluster and competency scores) on screen on submission. The development report is written for a manager or coach to use with the person, and it is for the organization to share it with the person who is to act on it.

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5. What Persona is, and what it is not

- **It is a self-report screening and development signal.** It captures how a person sees their own typical behavior across the framework. That is a genuine and useful source - but it is one source.
- **It is not a hiring decision.** The scoring deliberately has no reject path. A fit percentage informs how a screening conversation starts; it never closes one. The indicative readiness label on a hiring report is a reading of the fit percentage, not a decision. A human makes every decision.
- **It is not an objective measure of ability.** A self-rating reports a self-perception, not a demonstrated competence. Persona does not observe behavior the way the Assessment Center observed exercises do.
- **It must be corroborated.** Any Persona profile is a partial reading until it is triangulated. Pair Persona (the self view) with a Reflect 360 (the others view) on the same framework, and add interview and work evidence. No decision should rest on Persona alone.

These are not caveats added at the end - they are stated on the face of every report, for both purposes, so a reader cannot mistake the instrument for more than it is.

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6. Response-style and consistency

Self-report instruments are vulnerable to two patterns worth flagging: a respondent who rates everything uniformly high (an elevated, self-favoring profile), and a respondent whose forced-choice picks do not agree with their own ratings (inconsistent responding). Persona supports an advisory response-style indicator built from these two signals - profile elevation, and agreement between the normative Likert section and the ipsative forced-choice section that the bank also supports.

- **Elevation.** The signal is raised when the mean of all rated statements, after reverse mapping, is 4.6 or higher.
- **Agreement.** In each forced-choice set, the competency marked most like the respondent should carry a rated score at least as high as the competency marked least like the respondent. The signal is raised when fewer than half of the sets agree.

The agreement signal needs both sections, so a sitting with rated statements only produces the elevation signal alone, and a forced-choice-only sitting produces no indicator. Where the indicator is available, the report shows it as a response-style line reading either "consistent" or "review", with a short note.

The indicator is **advisory only and never a blocker.** A flag asks a reader to interpret the profile with care and to rely more on corroboration; it does not lower a score, fail a sitting, or change a decision. This matches how the platform treats validity signals elsewhere: an elevated or inconsistent profile is

surfaced for human judgment, not acted on automatically. The forced-choice format (most like me / least like me across statements from different competencies) is included as a complement to the rated section because a respondent cannot rate every statement highly within a set. It reduces uniform inflation; it does not remove deliberate impression management.

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7. Fairness, proper use, confidentiality and retention

Standards the instrument is held to

Persona's design and intended use are aligned with the following recognized standards for the proper use of assessment. Alignment is VIFM's own mapping against the published standard or law; it is not a certification, accreditation, audit or legal opinion by the body concerned, and VIFM has not sought independent certification against these standards.

- **ITC Guidelines on Test Use** - on the responsibilities of those who select, administer and interpret assessments.
- **Standards for Educational and Psychological Testing** (AERA / APA / NCME, 2014) - referenced for evidence-based item development and for the discipline of matching claims to evidence.
- **Uniform Guidelines on Employee Selection Procedures (1978)** - used as a reference for how a screening instrument may and may not be used in a selection context. Where Persona is used for selection, the user organization remains responsible for monitoring adverse impact and for the validity evidence the Guidelines call for.

Proper use

The self-report framing runs through every surface. A hiring report is positioned as a screening signal to be corroborated, never an automated decision; a development report is positioned as a growth plan the person owns. The fairness logic is structural, not cosmetic: there is no reject path in the scoring, reports are released only to authenticated administrators and authorized client managers, and every report states the corroborate-before-deciding rule on its face.

Confidentiality

A hiring report about a candidate is a controlled deliverable: it can be retrieved only by an authenticated VIFM administrator or by an authorized client manager for their own organization, so a respondent without an account cannot retrieve their own fit report by guessing its address. A development report is retrieved in the same controlled way and reaches the person through the organization. Per-competency answers and profiles are handled as confidential personal data throughout.

Consent

Consent is recorded before any response is collected, on every delivery route. Standalone access codes issued before 17 November 2026 are completed under the terms they were issued with.

Retention

Persona data follows the platform's default data-retention rule - a maximum of two years unless a contract extends it - designed with reference to UAE Federal Decree-Law No. 45 of 2021, the Saudi PDPL, and GDPR where applicable. Alignment is VIFM's own mapping against the published standard or law; it is not a certification, accreditation, audit or legal opinion by the body concerned. The two-year rule is applied to sittings taken through a voucher or as a standalone assessment. A sitting taken as part of an assessment engagement is held under that engagement's own data arrangements.

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8. Bilingual availability

Persona is fully bilingual. Every item, interpretation band, narrative and report surface exists in English and in Gulf-appropriate Arabic. The Arabic version was prepared alongside the English and is being reviewed by Arabic-speaking subject experts. The two languages mirror the same underlying data - the same item keys, the same competency mapping, the same scoring - so a profile reads identically in either language and a bilingual cohort is scored on one consistent basis. Arabic content is provided on a best-effort basis and is pending human review before high-stakes use.

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9. Contact

For methodology questions or research-collaboration inquiries, contact the VIFM consulting team: `contact@viftraining.com`.

Reliability and Validity Evidence

Two kinds of evidence: **(A)** established coefficients for the *method* (multi-item behavioral self-report), from the published literature; and **(B)** VIFM's own reliability procedures and their current status. We report (A) as evidence for the method, not as a claim about VIFM's specific item set.

A. Established coefficients for the method (published literature)

- **Published research on a related method:** meta-analyses of self-report personality inventories report modest relationships with job performance, strongest for conscientiousness (Barrick & Mount, 1991; Barrick, Mount & Judge, 2001). These studies concern personality inventories, not Persona. No study relating Persona scores to job performance has been carried out, which is one reason Persona is positioned as a screening signal, not a decision.
- **Internal-consistency convention:** α ≥ .70 is a commonly cited minimum for instruments at an early stage of development; Nunnally and Bernstein (1994) recommend higher values where scores inform decisions about individuals (.90 as a minimum). VIFM's target of .70 is a development-stage target.
- **Self-other agreement** (relevant because Persona feeds the self-versus-360 gap): meta-analytic self-supervisor correlation **ρ = .35** and self-peer **ρ = .36** (Harris & Schaubroeck, 1988). Agreement between self and others is modest, which is why Persona reports the self-versus-others gap as information to discuss rather than as error.

B. VIFM's own reliability - method, threshold, and current status

- **Internal consistency (planned):** Cronbach's **α** will be estimated for each competency from collected Persona responses once enough complete response sets are available; target **α ≥ .70**. Status: not yet computed.
- **Self-versus-others comparison:** inside Sequentia (succession readiness), each person's self-rating is set against the Reflect 360 ratings by others, competency by competency. This is a comparison for the individual; a study of how closely Persona self-ratings and Reflect 360 ratings agree across a sample (convergent evidence) has not yet been carried out.
- **Content consistency:** Persona uses the *same* 21-competency framework (v2) as the Assessment Center and Reflect 360.

References

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