



PART

Preferred Role Profile Overview

(Draft Document – not for release)

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PART Relative Role Preference Profiling Overview

It is a recognised fact that every person is different and that a task that would be enjoyable for one person could be like pulling teeth for another. This has, in the past, led to the development of psycho-analysis and character profiling systems so as to facilitate a better job fit for individuals within an organisation.

Whilst this appeared at first to be effective and to the benefit of the organisation as well as the individual employees, in the hands of inexperienced operators, these tools have led to the discrimination of employees based solely on the output of the test profile. The profile test should in fact form only a part of the selection criteria however, in the quest for psycho-analysis perfection, the test output has become more and more definitive thus encouraging the person reviewing the selection to place a heavy reliance upon the output of the test.

This is unfair practice as, whilst as an individual's profile may indicate that an aspect of a job may not come naturally to them, it does not necessarily mean that they will not be able to do it as well as the next person.

Having said this we must be careful not to throw the baby out with the bath water as there is a definite need for appropriate job fit in order to maximise job satisfaction and motivation. The emphasis, however, must not attempt to define a person's ability as much as a preference for certain types of task within a role. What are the things that they enjoy doing, which tasks do they detest and what types of tasks does the new role consist of?

It therefore follows that, if we recognise that there are certain groups of tasks that match certain people, we need to examine the roles within an organisation and group together like-profile tasks within roles so as to maximise possible job satisfaction and efficiency. In other words put together a team of people whose roles match their preferred profiles - take all the tasks that are done by a group of people and give all the administrative tasks to an administrator, all the coordinating tasks to a good coordinator etc.

As an illustration, in the insurance industry it took years before someone confronted the problem of the policy salesmen's' poor administration capability. It appeared that the better the agent was at dealing with clients and selling policies the worse his or her admin and paper work. Due to the way the thought process works in the human brain, a creative individual whom people warm to (the ideal profile for an insurance agent) is on the opposite end of the profile see-saw from the person who enjoys repetitive, after the event paperwork. It followed that those agents who were strong administratively did not achieve the level of sales that the "mavericks" reached. The eventual solution that evolved was a team consisting of a hot sales agent with what they called a "buddy". This buddy was an organised, administrative person who stayed in the office and organised the team's paperwork, appointments and meetings. The result was a quantum leap in productivity and job satisfaction coupled with a decrease in management load. In any organisation it is certain that you will find job descriptions containing conflicting components.



We have found that most job types or tasks fall into one of four Functional Categories (FCAT):

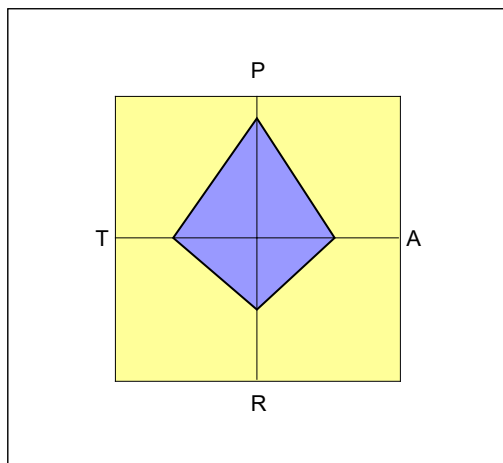
- F - Facilitation
- C - Co-ordination
- A - Administration
- T - Technical specialist

The aspects that classify them consist of a mixture of four criteria (PART):

- P - People interaction, facilitative, non-threatening discussions
- A - Amending, innovative, creative
- R - Running things, multitasking, co-ordination
- T - Table and figures, repetitive tasks, following instructions

In determining what PART a person would derive maximum job satisfaction from playing it is essential that the method used does not "score" them or give any output that could be used to attempt to gauge their ability.

The PART system gives the percentage ratio mix that would result in maximum job satisfaction for the individual concerned. Any detail greater than this is not only unnecessary but could result in misuse and unfair discrimination.



This example shows a preference for a balance of parts leaning more toward dealing with people. This could be described as a typical manager's role.

P - People interaction, facilitative, non-threatening, listen patiently
 A - Amending things, innovative, creative, finding a better way
 R - Running things, multitasking, co-ordination, bottom-liner
 T - Table and figures, repetitive tasks, following instructions

Interestingly the parts opposite each other tend often to be on opposite ends of a see-saw in many cases. For example the more preference for Amending the less for Tables and Figures and visa versa. Similarly the greater preference for People interaction and patient listening the less for Running things.





The ideal, balanced team should consist of a combination of people strong in each of the FCAT role types. The leader should be chosen according to the primary objective of the team. If, for instance, the team is responsible for the management of an auditing firm then the Administrator role is the closest to the primary objective of the team. On the other hand, in the instance of a Social Agency, the Facilitator would take the lead Role. The team management requires a departure from traditional, hierarchical thinking to a reliance upon, and respect of, complimentary roles.

To some extent this structure is in place at a macro level in many large organisations, it is only that no-one has understood or formalised the reasons behind its existence. Facilitation lies in the Sales, HR and PR departments whilst Administration is fulfilled by Finance, Co-ordination is usually the line management function and Technical is that section consisting of specialist, "propeller heads" that no-one knows what to do with.

The problem is that, as we move down through the ranks of the organisation, the FCAT mixture in the teams, or sections, disappears and we are left with creative, technical people stuck with administrative tasks as part of their function. The net result of this type of inappropriate task grouping is a loss of efficiency and job satisfaction as this profile of person hates and detests administrative work, however they are normally told that they must just do it as a part of their job.

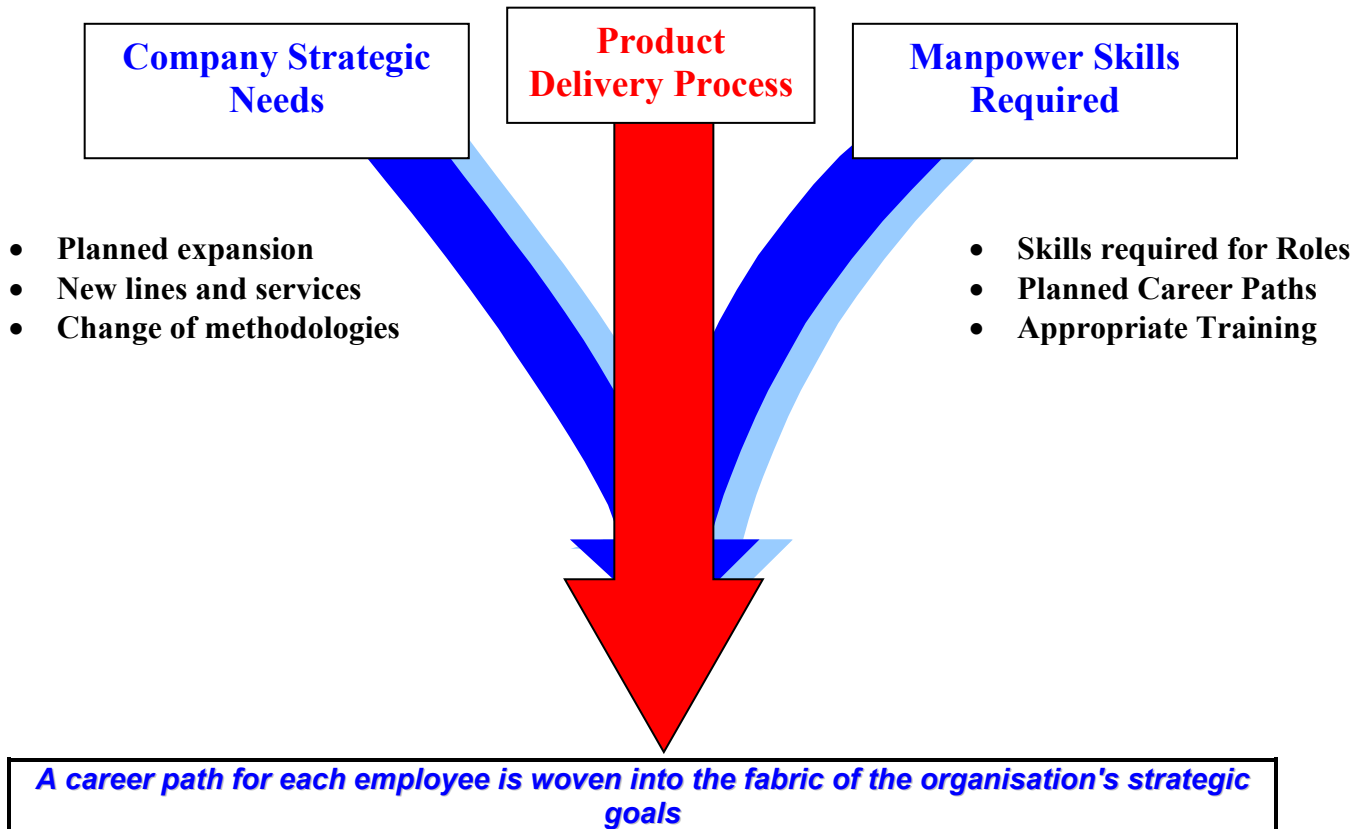
Another problem arises out of the fact that generally technical people are not allowed anywhere near clients as their people skills are also normally shocking. Consequently the sales component normally picks up this interface. Unfortunately however, as they are normally part of a different section and team, there are frequent problems that arise out of a lack of communication.

This is normally the product of "silo development" where, as the organisation has grown in size, the emphasis has moved from a small group of cross-functional, product delivery focussed teams to departmentalised functions with separate management and focus. In order to correct these problems Product Delivery Teams must be formed consisting of persons from each of the FCAT role areas. The proportion of numbers of personnel must be determined by the FCAT requirement profile of the section or Team. In the previous example of an Auditing firm at a company level there would be a large ratio of Administrators to Facilitators with a small number of Technical and Co-ordinators however the Business Development team would consist of the reverse mixture. In the example of a Social Agency the ratio of Facilitators and Administrators would be reversed, however in the Accounts section of the Social Agency there would be more Administrators than Facilitators.

This structure not only increases efficiency and effectiveness but also opens up career opportunities for different individuals throughout the organisation at all levels. People also learn to recognise and respect each others strengths and to understand their own worth and role in the organisation.



Strategic Career Planning Overview



Skills Development based Career Planning

- Every organisation consists of a work force carrying out a role that contributes to the Product Delivery Process.
- Each role requires specific skills and experience in order to perform it.
- Any Strategic change to the Product Delivery Process will require adjustment to the Roles of the people involved in it
- In a well-focussed and efficient organisation each person should only be trained in the skills required of them in order to perform their function.

The demands placed upon a modern company in terms of its ability to adapt to a constantly changing environment has meant that larger companies struggle to maintain market share or sustain real growth.

Smaller organisations on the other hand are lighter on their feet and are therefore able to quickly react to market needs and thereby lure good staff away from the larger companies where their futures are not as clear or exciting. A high turnover in key or quality staff most times costs an organisation dearly as there is no known fast track to imbibing the ethos of a company acquired over a space of time. It also results in the dilution of their competitive advantage in the market as their intellectual property leaves with the personnel, often to the competition.

Good quality people are difficult to find, especially specifically skilled and experienced individuals. For this reason a company must be proactive in the strategic development of its employees' skills. By coordinating career planning and training efforts with the Strategic



needs of the Product Delivery Processes the organisation's aims are then matched with those of the individual's goals thereby creating a visible career path available to each individual.

The FCAT method of categorising roles or positions acts as a suitable foundation for Strategic Career Planning allowing the organisation to agree a career path with its employees that not only addresses the aspirations of the individual but also the strategic resource needs of the organisation itself. For example, if the individual has an Administrative Relative Role Preference Profile then he or she would agree a career path with their mentor moving up through the "A" FCAT positions after fulfilling the experience, skills and competency requirements at each level. The timeframes for each promotion can be roughly estimated by the requirements for the position and progress checked and discussed at each periodic evaluation. This ensures that the organisation becomes the preferred employer as an employee's future is clearly mapped out for them and expectations can be managed.

It should be noted that, for instance, in an accounting or administrative department, there will be positions whose FCAT profiles are not "A" and there will be accountants or book-keepers whose FCAT profiles are also not "A". This method of categorisation will ensure that those people will be able to identify the positions, in their largely administrative department, that they would in fact be happy in.

The PART profile of each job within the FCAT categorisation gives the employee an even closer idea of whether or not they would enjoy the position.

The career path can move between "A" FCAT roles across department boundaries up to a certain level of seniority after which point in time the employee must build on specialist knowledge within one department or "knowledge area". This would apply to the F, A & C categories whilst the "T" category would generally stay within the Technical department or environment.

A system of Matrix Management is ideal for this structure concept with the individual reporting through a direct line to the Product Delivery Team Leader for his or her performance whilst receiving skills development management and support through an in-direct line to his or her professional or department manager.

The following pages contain examples of some of the questions on the Relative Role Preference Profile Questionnaire together with an example of the output. The product does not measure individuals' abilities but instead shows the ratio mix between those aspects of a role that will ensure maximum job satisfaction and therefore motivation.



Example of Personnel PART / FCAT Questionnaire

Overview

There are always aspects of a job that we love and then those that we may do very well but really do not like. The interesting thing is that those things that *you* hate to do may be the very things that another person loves.

Please Note:

- The objective of this questionnaire is to see what PART of a role you would MOST ENJOY playing.
- It does not test you to see what you can do or whether you are suitable for a position.

The PART system as a whole looks at swapping tasks around so that everyone gets to enjoy their jobs *that* much more. It also establishes the kind of job that everyone does so, when you plan your career path through the company, you can get an idea of not so much whether you can do the job you are looking at, but rather would you enjoy doing it.

The output of the test does not give a score but shows a ratio of the mixture of task types that you enjoy the most and the company-wide objective of the exercise is to maximise job satisfaction and motivation.

Instructions for filling out the Questionnaire

There are a series of questions on the following pages with five answer options next to each one. In order to find out what you really enjoy doing you are allowed, for once, to be totally honest in your choice.

IMPORTANT : Do not answer with what you think you should do because we all know we *should* do, be absolutely selfish and have the freedom to choose what you would feel happiest doing if given a choice in the matter (this could of course be the same thing in many cases). Again, please do not indicate what you would like to aspire to but rather what you are happiest or most comfortable doing – throw all caution to the wind.

NOBODY IS GOING TO JUDGE YOUR ANSWERS

Place an "X" in the box next to the response that closest describes how you would feel happiest reacting or responding (only one "X" per question)

(remember it's what you would feel happiest doing - not what you think you should do)

| | |
|-------------------------------|--|
| Name: | |
| Employee Number: | |
| Job Title: | |
| Section or Department: | |
| Date: | |



PART – PREFERRED ROLE PROFILE QUESTIONNAIRE

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|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | When it comes to discussing a work problem with a group of people would you: | A | Prefer spending a lot of time in getting to understand everyone's' various points of view and discussing their perspectives and the way they feel. |
| | | B | Enjoy team discussion but prefer it if people do not waste time by not coming to the point. |
| | | C | Give input where needed. |
| | | D | Like only to work with people who are on the same wavelength as you. |
| | | E | Prefer to work alone. |
| 2 | A member of staff who is junior to you requests your permission to do something that you do not feel is right, would you: | A | Feel best about telling them "no" straight out. |
| | | B | Prefer to sit them down and explain why you feel you have to say "no" |
| | | C | Rather find the policy that covers the situation and show it to them. |
| | | D | Prefer to discuss it first with a colleague and then inform the person of what you both feel. |
| | | E | Rather tell them to discuss it with your boss. |
| 3 | The person who was in your position before you has organised the work into a set pattern for each day. Each day starts with the same routine and continues with the same tasks with almost no variation from day to day, would you: | A | Be happy to work in such an organised environment, pick up the systems that he or she has established and carry them on in the same efficient way. |
| | | B | Enjoy the organised environment but vary the days slightly. |
| | | C | Carry out the job as expected. |
| | | D | Find some way of breaking the repetitiveness. |
| | | E | Find that the repetition would drive you crazy. |
| 4 | If you had to choose how much to focus on the technical aspect of your job, would you: | A | Prefer to organise people and teams. |
| | | B | Prefer to rather focus on organising the way things are done by the company. |
| | | C | Enjoy a balance of all aspects. |
| | | D | Like involvement in other areas but focus on a technical career. |
| | | E | Like to be left alone to focus on your technical work. |
| 5 | If you are in a meeting with a small group of people discussing a work problem and one of the members of the group side tracks the discussion with a personal problem would you: | A | Be happy to let the work problem discussion be put on hold and address the member's personal problem |
| | | B | Feel comfortable asking the member if they would like to come and discuss the problem with you later. |
| | | C | Keep quiet. |
| | | D | Prefer to suggest that the member arranges to discuss their problem over the lunch hour with anyone else in the group who may be able to help |
| | | E | Object to the waste of time and get the discussion back to business |



PART – PREFERRED ROLE PROFILE QUESTIONNAIRE

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| 6 | An angry customer comes to you with a complaint that requires a refund or replacement which is not really your decision, would you: | A | Make no comment regarding what is right or wrong but promise that you will have your boss look into it and get back to them. |
| | | B | Say that you see their point but you will have to get somebody more senior to get back to them, then refer it to that person to deal with. |
| | | C | Tell them you will look into it personally and get back to them and follow it up yourself. |
| | | D | Inform the customer that you feel that the company should replace the item or refund them but that you must get permission before doing it. |
| | | E | Use your initiative and decide whether to replace the item or refund them and then do it there and then. |
| 7 | An unhappy client calls a meeting with yourself and your boss at his office, you are on your way to the client when your boss phones you on your cell to say he can't make the meeting, would you: | A | Welcome the opportunity to deal with the situation yourself and tell your boss not to worry and that you will handle it. |
| | | B | Be happy to deal with the situation yourself rather than upset the client. |
| | | C | Be prepared to go to the client's office and ask him to reschedule the meeting. |
| | | D | Prefer to phone the client and ask him to reschedule the meeting. |
| | | E | Be happiest asking your boss if he wouldn't mind giving the client a call and rescheduling the meeting. |
| 8 | You are offered an appealing position with the company in a very pleasant environment, the only thing is that, whilst you will be given good salary increases, there is no promotional path, would you: | A | Be quite happy to carve your place in the company by staying in that same position for the foreseeable future. |
| | | B | Be quite happy to give it a try. |
| | | C | Go along with it for now. |
| | | D | Rather wait for a job with more prospects |
| | | E | Definitely not accept a dead-end position. |
| 9 | You become involved in a work related issue that you strongly disagree with, would you: | A | Cooperate as much as possible and go out of your way to resolve the matter quietly and amicably, upsetting as few people as possible. |
| | | B | Keep an open mind on the subject and make as few waves as is possible. |
| | | C | Just keep quiet and get on with your work |
| | | D | Make your position quite clear. |
| | | E | Stand firmly for what you believe is correct and openly air your point of view to try and obtain the support of as many colleagues as possible. |
| 10 | If you are in a group of people you know and are approached by another group of strangers would you: | A | Enjoy being the first to step out and greet them, find out who they are and introduce them to your group. |
| | | B | Be content to wait and see if someone else greets them but, if no one else does, be happy to see what they want |
| | | C | Be prepared to meet them if nobody else does. |
| | | D | Prefer to wait and let someone else find out what they want. |
| | | E | Prefer not to meet them unless it was necessary. |



PART – PREFERRED ROLE PROFILE QUESTIONNAIRE

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| 11 | You are the only experienced person working in a small, understaffed section that requires you to be all things to all people, would you: | A | Enjoy the stimulation of answering everyone's questions, handling interruptions and changing your function from on thing to another. |
| | | B | Be happy with handling the situation of multi-tasking and interruption without any problem. |
| | | C | Be happy to cope the best you can. |
| | | D | Like your boss to be aware that you dislike your concentration being broken and being dragged from pillar to post. |
| | | E | Want your boss to know that you find the situation totally draining and end up dizzy at the end of the day. |
| 12 | New desks are delivered to the office in kit form and everyone has to assemble their own, would you: | A | Unpack all the pieces and, having laid them out on the floor, carefully read the instructions to identify each piece before following the instructions step by step, doing exactly what they say. |
| | | B | Use the instructions to assemble your desk. |
| | | C | Watch how someone else does it and then get them to do yours or do it the same way as them. |
| | | D | Have a quick read through the instructions and then put the desk together only referring to the instructions if you get stuck. |
| | | E | Just put the desk together and only use the instructions if you get stuck. |
| 13 | Some of your work colleagues appear de-motivated would you: | A | Enjoy making time to spend with them individually to find out why they are feeling bad about themselves or if someone has upset them and then talk it through with them. |
| | | B | Prefer to get the Human Resources section to speak to them, organise a party, a motivational talk or something to get everyone positive again. |
| | | C | Be prepared to help if asked to. |
| | | D | Rather give them time and space to get over it - don't go sticking your nose in. |
| | | E | Feel that they should get their own acts together and not be a negative influence on everyone else - shape up or ship out. |
| 14 | You are transferred to a brand new section where you are continuously having to deal with situations that are not covered by policy , do you think you would: | A | Really enjoy the freedom of making decisions and forming policy as and when required. |
| | | B | Prefer to make the decisions and policy as required. |
| | | C | Find it a bit much at times. |
| | | D | Like to be transferred back to a normal, organised environment. |
| | | E | Like your boss to understand that you find the lack of systems and policy unbearable. |
| 15 | Your company has strict policy regarding the way things are done, would you: | A | Enjoy having things clearly defined and spend time making yourself familiar with all policy. |
| | | B | Feel organised and able to work easier. |
| | | C | Do what is expected of you. |
| | | D | Find strict policy inhibiting. |
| | | E | Feel trapped and unable to work the way you would like to. |



PART – PREFERRED ROLE PROFILE QUESTIONNAIRE

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| 16 | Your job requires that you stay in one work area, would you: | A | Enjoy working in one area all the time. |
| | | B | Be quite happy to stay in your area. |
| | | C | Conform to what you have been told to do. |
| | | D | Enjoy getting out for a change of scenery. |
| | | E | Take every opportunity to escape. |
| 17 | Whilst doing your work, would you: | A | Enjoy being continuously in search for new angles and better ways of doing things. |
| | | B | Be able to often think of new ways of doing things. |
| | | C | Just like to do what you are meant to be doing. |
| | | D | Prefer to only think about improvements if you have time. |
| | | E | Prefer to not waste any time and energy daydreaming about something that is working fine, just get on with it. |
| 18 | A situation arises that is not governed by company policy, would you: | A | Investigate all the pro's and con's and then seek permission from someone senior before taking action. |
| | | B | Make absolutely sure of all the facts and exercise extreme caution in making your decision. |
| | | C | Bounce the facts off your colleagues and make a safe decision. |
| | | D | Look at the facts and take a calculated risk. |
| | | E | Trust your instincts as they are normally right. |
| 19 | When teaching or explaining something to a group of people would you: | A | Enjoy making good use of language to convincingly impress the audience and go to some length to talk to each point without being irrelevant or boring. |
| | | B | Enjoy giving an interesting and informative talk. |
| | | C | Give it your best shot. |
| | | D | Just keep the talk short and to the point without being abrupt. |
| | | E | Just present the facts as they speak for themselves or even prefer to let someone else do it. |
| 20 | You have been given a list of tasks that must be done each day, would you: | A | Enjoy putting together a schedule organising to do them at the same time each day, probably first thing when you come in, as soon as you have had your coffee and watered your plants. |
| | | B | Organise to do them at a certain time each day. |
| | | C | Do them as you have been told to. |
| | | D | Try and fit them in first thing in the morning if nothing else more important comes up. |
| | | E | Try and get them done during the course of the day, as and when you have time. |
| 21 | Your boss asks you to draw up a detailed plan of what you think your section will be doing during the next three months, would you: | A | Rather work on a longer term plan that embraces issues that effect the company as a whole in terms of where you feel it should go in the future. |
| | | B | Prefer to produce a six month plan that has less detail but covers more topics and ideas including how your section relates to other sections as well. |
| | | C | Happily do it. |
| | | D | Like to ask him if he could discuss the areas he would like you to include. |
| | | E | Preferably like to ask him if he could give you the framework of the plan and you would research the details and fill them in. |



PART – PREFERRED ROLE PROFILE QUESTIONNAIRE

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| 22 | If you are given a task that involves sifting through and analysing a tremendous amount of detail would you: | A | Really enjoy this kind of work, find it easy to keep your concentration and keep working away at it for days on end. |
| | | B | Be happy and work away at it, able to keep your concentration for long periods |
| | | C | Work your way through it. |
| | | D | Get on with it even though you find it boring |
| | | E | Find it boring and almost impossible to concentrate for any length of time. |
| 23 | When you and your colleagues have a difference of opinion would you: | A | Enjoy spending time and effort in persuading them to your point of view as you know that, sooner or later, they always see it your way. |
| | | B | Be willing to attempt to get them to see your perspective. |
| | | C | Hope that things will work out in time |
| | | D | Be content to accept their position and agree to disagree. |
| | | E | Be quite content to let them think what they like because you know that you are right anyway. |
| 24 | One aspect of the administrative part of your job is to make a summary each day of the work you have done and then at the end of the week produce a weekly summary report for your boss, would you: | A | Really enjoy doing it as it rounded off each day and gave you a feeling of being organised and knowing exactly what is going on. |
| | | B | Produce the reports on time and accurately filled out as required. |
| | | C | Do what is required of you. |
| | | D | Dislike stopping what you are doing in order to do it. |
| | | E | Find that your time could be better spent focusing on your work and so give it to your secretary to do for you. |
| 25 | If there is an alternative product to the one you supply that will work better for a client, would you: | A | Sell him your product anyway |
| | | B | Do not push your product but keep quiet about the alternative |
| | | C | Not say anything |
| | | D | Tell him about the alternative product |
| | | E | Advise your client to purchase the alternative product as it will be better for him |
| 26 | Your boss closely monitors your work, would you: | A | Enjoy bouncing things off him or her all the time to make sure that you are doing them correctly |
| | | B | Feel a sense of security |
| | | C | Not really notice. |
| | | D | Feel that you are unable to use your own ideas. |
| | | E | Feel caged in and unable to make any decisions based on your own ideas. |



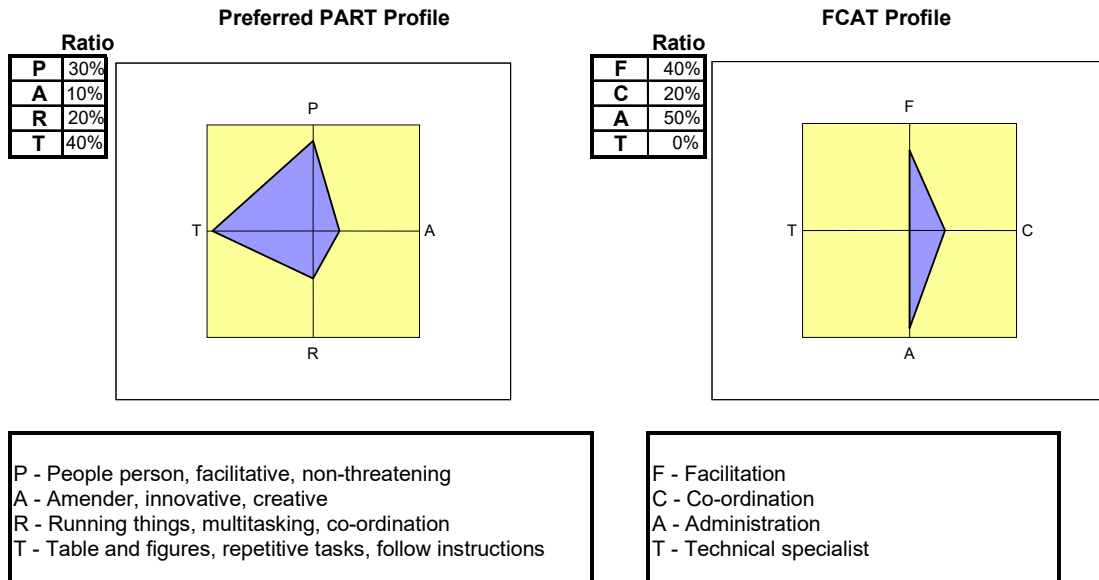
PART - RELATIVE ROLE PREFERENCE PROFILE

Examples of PART / FCAT Test output

First example:

This profile shows a preference for administrative work but also dealing with people. She will enjoy organising and improving the way things are done if necessary but prefers to just get on with the work and enjoys repetitive tasks.

Name: Mrs. Receptionist Cashier



Second example:

This profile shows a preference for organising a team of people creatively. The person enjoys co-ordinating and amending and is very people focussed but dislikes repetitive administration.

Name: Mr. Big Picture Team Leader

