



The PI Value Checklist

Are you getting the most out of your PI investment?
34 checks. Under 10 minutes. No sugar-coating.

Most organizations use a fraction of what PI can do. Certification gets you started, but it isn't an implementation plan. Tick only what is true **today**. Every empty box is ROI you've already paid for and aren't collecting.

◆ = **Partner-delivered.** Something your PI partner should be driving, not something you should have to work out alone.

Company _____ Completed by _____ Date _____

1 Foundation Set up, access & baseline training

Score ____ / 7

- ☐ **Objectives set.** Written business goals with baseline metrics, agreed at kickoff. ◆
- ☐ **Executive owner.** A C-suite sponsor owns PI success and is accountable for results.
- ☐ **Leadership trained.** Your leadership team is trained on PI, not just HR.
- ☐ **Champions trained.** About 1 trained PI Champion for every 50 employees.
- ☐ **Platform configured.** Org structure, SSO and phased user access set up properly.
- ☐ **Everyone assessed.** Every manager and employee has completed an assessment, not just leaders.
- ☐ **Launched company-wide.** A kickoff, comms campaign and manager intro session actually happened. ◆

2 Activation Live use & integration in your processes

Score ____ / 6

- ☐ **Job targets in place.** A target exists for every open role category.
- ☐ **Hiring runs on PI.** Every new hire is PI-informed, not just select roles.
- ☐ **Built into onboarding.** PI is part of your new-hire onboarding process.
- ☐ **Managers use it.** All managers use PI in 1:1s, PDPs and every review.
- ☐ **Systems connected.** ATS/HRIS integration is live, or the API decision has been made.
- ☐ **Day-60 review held.** Usage data and adoption gaps reviewed with your partner. ◆

3 Optimization Self-sufficiency, measurement & strategy

Score ____ / 5

- ☐ **Adoption is measured.** 85%+ of licensed users are active monthly, and someone reports it.
- ☐ **Outcomes are reported.** A 90-Day Outcomes Report was delivered. ◆
- ☐ **ROI is reported.** Your executive sponsor sees PI's impact on quality of hire and manager effectiveness.
- ☐ **Cadence is on the calendar.** QBRs and an Annual Business Review are scheduled. ◆
- ☐ **Capability compounds.** 80%+ of your PI Champions are certified, and renewals are kept current.

Focus areas: where PI value compounds, or stalls Same rule: tick only what is true today.

Hire

Score ____ / 5

Hire the right people

- ☐ **Fully trained.** Hiring managers and TA are trained on Hire, through certification or in-house training.
- ☐ **Standardized.** One Head, Heart, Briefcase hiring process across teams.
- ☐ **Documented.** Hire is built into, and documented in, your interview process.
- ☐ **Measured.** Quality of hire is tracked against PI data.
- ☐ **Performance tracked.** Role performance metrics are captured so ROI can be shown and job targets improved.

FREE TOOL

Head, Heart & Briefcase app: interviewers score candidates independently across all three.
headheartbriefcase.com

Design

Score ____ / 4

Design your teams

- ☐ **Teams built.** Design teams exist for your key functions.
- ☐ **Aligned.** Team Alignment to Strategy sessions have run with leadership teams.
- ☐ **Proactive.** Design informs hiring-manager discovery before a role opens.
- ☐ **Self-sufficient.** HRBPs can lead Design sessions without a consultant.

YOUTUBE

PI Hacks: quick videos from PI users that teach you how to get more from your PI software, fast.
youtube.com/@predictiveindexhacks

Inspire

Score ____ / 4

Inspire your leaders

- ☐ **Beyond certification.** Managers are trained on Inspire, not just on what PI is.
- ☐ **Coaching guides.** Used to tailor development conversations to each person's behavior.
- ☐ **Relationship guides.** Used to compare two people, uncover friction and improve collaboration.
- ☐ **Recognition.** Recognition is tailored to each person's behavioral needs.

Obi

NEW

Score ____ / 3

PI's AI assistant: behavioral intelligence, in the moment

- ☐ **Switched on.** Your admin enabled Obi (needs an active Inspire subscription).
- ☐ **Given context.** Company website, description or up to 3 files are loaded.
- ☐ **Used weekly.** Managers prep 1:1s and hard conversations with Obi, then review the output.

Currently free to PI clients. An admin must switch it on.

FREE GUIDE

Obi Prompt Guide for Managers:
20+ ready-to-use prompts across 6 conversation types. [Scan or click to download.](#)



YOUR SCORE Phases ____ /18 + Focus areas ____ /16 = Total ____ /34

0-11

Shelfware risk

You're paying for PI and mostly not using it. Certification happened; adoption didn't.

12-23

Partial value

Pockets of real use, with gaps. There is ROI on the table, and it is fixable.

24-34

Optimizing

Strong foundation. Now prove the ROI and expand into new use cases.

◆ Unchecked **partner-delivered** boxes: ____ of 5. **Missed three or more? The gap isn't your software. It's your support.**

Turn your score into a plan



FREE · 60 MINUTES

PI Value Consultation

Bring your score. We run a deeper discovery on how you use PI today and give you prioritized recommendations to close the gaps.

talentoptimizers.com/contact-us



THE FULL PLAN

PI Implementation Playbook

The Foundation, Activation and Optimization plan behind this checklist.

talentoptimizers.com/predictive-index-implementation-playbook

How we implement: ◆ Kickoff in 14 days ◆ Client Success Manager ◆ QBRs + Annual Business Review ◆ Free core-team training