

## Personality Counts

*Personality assessments are being used in new ways throughout the employee life cycle.*

By **Eric Krell**

### WEB EXTRAS

▣ **Staffing Management: Use Personality Tests Legally and Effectively** (Spring 2005)

▣ **HR News: Experts: Reassess Personality Tests in Light of Court Decision** (July 2005)

▣ **Personality Tests: More Than Meets the Eye** (Source: Recruiting & Staffing Focus Area)

▣ **HR Magazine: Personality Counts** (February 2002)

▣ **"I'm in the Mood for Validity"** (SHRM White Paper)

▣ **Using Personality Assessment in Personnel Selection** (SHRM White Paper)

▣ **The Truth about Integrity Testing in Employment** (SHRM Legal Report)

▣ **Reliability and Validity of Selection Tests** (SHRM Briefly Stated)

▣ **Selection Tests** (SHRM Briefly Stated)

▣ **Assessment Tools and Centers** (SHRM Briefly Stated)

▣ **SHRM Testing Center**

▣ **Association of Test Publishers** (external link)

▣ **Uniform Guidelines on Employee Selection Procedures** (Source: EEOC via

Personalities clash or gel. Jobs fit or they don't. It's inevitable.

Or is it? What if you could take out much of the guesswork involved in finding the right people to work together, fitting the right people to the right jobs and positioning the right personalities necessary for your company's stage of development?

HR professionals are doing just that by using an old standby—personality assessments—in new ways. The tests themselves may be familiar, but their application—how, when and where they are used—has changed dramatically in recent years.

For example, South Deerfield, Mass.-based The Yankee Candle Co. first used personality assessments as a leadership-team exercise in May 2003. Since then, the organization's application of the behavioral instrument has spread like wildfire.

"There are a lot of milestones along the employee life cycle, and we use this tool at every single one of them," says HR Senior Vice President Martha LaCroix, SPHR. Yankee Candle uses personality assessments to assist with leadership development, individual development, team communications, conflict resolution, coaching and hiring.

Like Yankee Candle, other companies are using these instruments in new ways that span an employee's entire life cycle with the organization.

What employers *aren't* doing is using the tests to weed out applicants who are not a cookie-cutter match of the ideal employee. To the contrary, HR professionals are using personality profiles to analyze the organization's "bench strength" and to find a variety of candidates who possess the diverse personalities and styles that the organization needs.

### Teaching an Old Dog New Tricks

Once used almost exclusively as an additional screening mechanism in the hiring process, companies now integrate personality assessments with skill tests, leadership evaluations, 360-degree reviews, and other performance management processes and systems. Some organizations link personality types to specific job classifications and, in some cases, to best-practice personality profiles of specific positions.

For example, Yankee Candle recently identified its best- and worst-performing store managers—based on performance initiatives—and asked each manager to complete a Predictive Index (PI) personality assessment from PI Worldwide. Armed with the results, LaCroix worked

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with PI Worldwide consultants to develop a best-practice behavioral profile of a top-performing store manager. The profile looks at work-related qualities such as sense of urgency, independence, motivational drive, communication style and attention to detail.

In light of the results, district managers give more free rein to store managers whose behavioral assessments match the best-practice profile, while lower-performing store managers are encouraged to try out behaviors that might lead to more-productive results.

Tying personality assessments to business performance, as Yankee Candle has done, is ideal, says Patricia Weik, Ph.D., a psychologist and senior consultant and director of research and development for RHR International in Wood Dale, Ill. "Can you correlate the results of personality assessments with harder business metrics? If you have a profile of a supposedly successful salesperson, does that profile link to sales revenue?"

The answer, from Yankee Candle and other companies that are weaving personality assessments deeper into their human resource processes, is a resounding yes.

Dennis LaRosee, senior vice president of Wellesley, Mass.-based PI Worldwide, sees "much better integration of the recruitment process, selection process, performance management process, succession planning process, in all sizes of companies." Based on his experiences, organizations that invest in a personality assessment tool tend to be well positioned to apply the instrument throughout the employee life cycle.

Take training, for example. David Pfenninger, Ph.D., a psychologist and CEO of Performance Assessment Network (PAN) in Carmel, Ind. (with which the Society for Human Resource Management has a business relationship), says some PAN clients use the assessments as much for training and development purposes as they do to strengthen their hiring processes. And many clients use the assessments as less of a screen than as a tool to generate targeted questions for subsequent interviews, message job duties based on a top candidate's strengths, and customize training and development programs once a new hire is on board.

If personality assessments are being used more widely, perhaps that's because they have gained wider acceptance. Pfenninger, whose company sells assessments in 32 different countries, believes the multi-factor (usually there are between four and six) dimensional model of personality assessment has achieved a state of global acceptance in recent years.

### Application Expansion

The expanding use of personality assessments means HR professionals are making new use of these tools in a number of areas, especially those that follow:

### How I Failed to Fool the Assessments

"I would predict that you're a freelancer rather than an in-house employee of the magazine," Dennis LaRosee, senior vice president of PI Worldwide, told me over the telephone.

He was right. The rest of LaRosee's analysis of my Predictive Index (PI), the assessment his firm publishes and administers, would also prove eerily on target—despite the fact that I had, at times, tried to fool the PI and other assessments I completed online from my home office while researching this article. The Hogan Personality Inventory found me "reflective and self-critical" (these descriptions, I was disappointed to see, appeared under "strengths") and noted that I may "become tense and easily annoyed by minor inconveniences and setbacks—especially during times of stress or heavy workloads."

Another assessment designed to gauge my C-suite potential found me highly innovative but "below average" for "leadership and drive for results." A six-factor personality questionnaire placed me in the 99th percentile for "openness to experience" but relegated me to the 25th percentile in "methodicalness." (I'm not sure that's even a word, although I'm not inclined to look it up.)

I put less faith in the latter results, however, since I had scored a bit low on the report's consistency index. The test knew I was fudging some answers—a reflexive reaction to my days as a job candidate. Whenever a recruiter handed me a personality test back then, a voice inside my head would pipe up: "OK, what are they really looking for here?"

Most good personality assessments contain some sort of candor measure, notes James Hazen, president of Applied Behavioral Insights. "If it is a sound assessment, people should not even think

• **Recruiting.** Kent Burns, one of Management Recruiters International's top-producing recruiters and a partner in one of the company's Indianapolis franchises, uses personality assessments because they help him find diamonds in the rough.

Some of Burns' clients will consider only candidates with a high "on-paper" pedigree, but those organizations are beginning to hurt for talent at certain levels—a need Burns expects to intensify as the U.S. candidate pool contracts. When Burns finds a talented executive without a Top 25 MBA or other A-player credentials, he summarizes the individual's skills and his client's position to a PAN consultant, who then recommends a battery of online personality tests for the recruit.

If the recruit's results confirm Burns' instincts about the candidate, he relays the results to his client with the assurance that the candidate will perform on par with executives who own shinier resumes.

Using personality assessments to confirm HR professionals' instincts is a benefit of these tools, explains James Hazen, Ph.D., a psychologist and founder of Applied Behavioral Insights in Wexford, Pa. "You know you like them," says Hazen. "Now you can determine exactly why that is and use that criteria for selection, development and retention."

• **Hiring for fit and diversity.** Yankee Candle does not use personality assessments as a way of weeding out applicants, LaCroix stresses. Rather, the company uses the tests to ensure a good fit between applicant and position. "We're not looking for a certain type of personality pattern," she notes.

Hazen sees more companies that, like Yankee Candle, are using assessments to ensure a good fit. In fact, he sees more hiring managers sharing the results of these assessments with final-stage candidates to gauge their comfort with the job fit and, in some cases, to collaborate on ways to adjust job responsibilities to create a better match.

A personality assessment helped Rebecca Vinton recognize that an employee was not a good match for the job. "I called my counterpart [at company headquarters in Belgium] to discuss a production manager who was struggling in his new role," reports the recruiting and training manager at Carmeuse North America, a Pittsburgh-based producer of lime. "I told her, 'When I look at this person, I see a high C, followed by a D,'" Vinton recalls, referring to the employee's "conscientiousness" and "dominance" scores. "She said, 'Why, of course! That's why this person is always asking for more information, which is actually a sign of resistance to change.'"

about 'beating the test,' " advises Hazen.

I felt a little beat-up, or at least stressed-out, by the tests that asked me to register on a scale of one to five the degree to which I agreed or disagreed with a statement. On those, I resolved not to check neutral, which I feared would peg me as wishy-washy.

Afterward, listening to LaRosee's comfortable and thorough description of my PI results immediately soothed any tension or anxiety I harbored about my "self pattern."

If the "world lets Eric be Eric," LaRosee posed, the world could expect to see a strongly independent, goal-driven individual who courts risk, seeks out new experience and prefers big-picture challenges to nitty-gritty detail work. I listened raptly (I'd no doubt be a "high E" if egotism were a dimension) as LaRosee fleshed out the behaviors of an Eric unfettered by a job description and daily responsibilities. It sounded too good to be true, given the dispiriting results of my other personality assessments.

But that was only part of the story the PI tells. LaRosee then showed me how the assessment indicates I behave given the constraints of my work. Fortunately, there were few gaps between my work and self patterns.

In one of those gaps, I'm more organized and detail-oriented ("methodicalness," according to my trusty Tenth Edition of Webster's Collegiate, is indeed a noun) on the job than I am naturally inclined to be away from work. That adaptation makes sense given my line of work, LaRosee noted, and is not too much of a stretch from my self pattern.

He concluded by emphasizing that our session represented only a hypothetical first step in the process of developing successful employees. The ensuing steps depend on how managers use that information throughout the employee's tenure with the company.

After his concerns about the voices in my head were addressed, my own boss gave me free rein to let Eric be Eric—as long as I immediately stopped referring to myself in the third person.

## Acing the Administration of Personality Tests

Taking tests is no fun, no matter what the subject.

"Your mind harkens back to 10th grade chemistry, and you think you can somehow fail the personality test," says Jill Haselman, senior vice president of organizational development and culture for Benchmark Assisted Living. To help reduce anxiety about test results, Haselman routinely shares her own personality profile when she presents new managerial hires with the results of their personality assessments.

Penny Pilafas, vice president of HR at trucking company Pitt Ohio Express, says: "When I present [the test] to anyone, it is understood that this is an assessment: There is not a right or wrong, there is no good or bad. It is a way to assess your natural tendencies and your highest and best value. It's also a way for us to figure out if someone fits this job or is better suited for another position."

Existing employees, she says, are not threatened by the assessment "because it is presented as a way to help them improve specific areas or make sure that we're tapping into the highest and best value they bring to the table."

To temper test-taking discomfort, those administering the assessments should confirm the tool's validity and reliability, as well as its compliance with appropriate regulations. Assessments used in the hiring process must adhere to guidelines from the Equal Employment Opportunity Commission.

Those who publish, process and present workplace personality instruments stress that the tools are assessments rather than tests. There is no pass or fail, and the results are only as valuable as their application to the development of an employee, a team or the organization. Thus, HR managers should also clearly communicate the purpose of the assessments and the way in which an individual's results will be used.

personality assessment and then held a meeting to discuss how different personality types process information differently and, ultimately, adapt to change differently.

- **Conflict resolution.** It sounds contradictory, but effective personality assessments can depersonalize conflicts between employees. While personality is a highly unique, complex concept, most assessments distill key characteristics of personality into broad motivational categories that can be easily understood and communicated. Disputes become less about personal attacks and more about identifying ways to work around innate motivational differences and styles.

After Vinton's discussion with her colleague, the high-C manager was reassigned to a position that better matched his behavioral strengths.

Benchmark Assisted Living, in Wellesley, Mass., uses personality tests to ensure a good fit by hiring candidates whose personalities fit the needs of the business and complement those of existing executives. Jill Haselman, senior vice president of organizational development and culture, uses the PI to strengthen—and diversify—the company's hiring process. The organization uses assessments to ensure that its executive team—currently dominated by growth-minded entrepreneurs—includes executives with personalities that can help manage the company as it moves into more mature stages five to 10 years down the road.

"We want to make sure that we're not adding leaders in [personality] areas where we're already heavy," Haselman explains. "We want to make sure we have the right qualities to guide us through the unique challenges of our next stage of growth."

- **Onboarding.** Personality tests also are being used to help new hires more quickly reach a comfortable and effective working relationship with existing employees.

For example, all final-stage executive candidates at Yankee Candle take an assessment. Later, LaCroix sits down with the new leaders and pores over important information about their direct reports—including their performance objectives, performance reviews and personality assessments. Doing so, LaCroix says, "doesn't substitute for their own judgment and assessment of the talent on the ground, but it gives them a place to begin."

LaCroix also shares the new executive's personality profile with the person's direct reports and peers.

At Carmeuse, Vinton uses personality assessments to help managers lead new and existing staff members through change. When a department recently added a host of new hires, she gave everyone a four-dimensional

Thus, the focus of resolving a conflict centers on *how* to communicate differences rather than on *what* is being communicated.

"The objectivity of the tool and the fact that it purports to measure these intrinsic truths about ourselves makes the discussion less personal," says LaCroix, "and rarely sparks any defensive posturing."

- **Coaching.** HR managers at Yankee Candle use personality assessments to help line managers coach their direct reports and to help subordinates coach upward. HR also guides line managers on how to use the assessments with peers. Some of those peer-to-peer interactions have progressed into full-fledged coaching relationships.

- **Leadership development.** Carmeuse has begun to weave personality assessments into its leadership development program. High-potential employees are currently taking assessments, the results of which will be analyzed to distill success factors. Those factors will help guide training and development as well as coaching initiatives.

At Pitt Ohio Express, a Pittsburgh-based trucking company, Vice President of HR Penny Pilafas and her colleagues are currently forecasting how key roles in the company will change five years from now. Pilafas started the analysis by projecting which jobs, skills and personality attributes her own function will require in 2010. She's currently administering personality assessments throughout her function and plans to compare those results to the 2010 projects. The gap analysis will guide the way she and her managers train incumbents during the next three years so that they evolve as their roles change.

- **Staffing needs assessment.** At Benchmark Assisted Living, Haselman also is using personality assessments to guide executive development. The company is progressing from a start-up into rapid growth, and Haselman wants to make sure the business has the executive talent it needs to sustain its momentum. So the organization is conducting an analysis of PI profiles of the top 14 executives to identify which stages of company growth (start-up, rapid growth and maturity) each leader is naturally wired to support.

## A Heady Business Case

Companies' use of personality assessments can form an ongoing cycle in which HR tweaks its hiring processes, improves processes for onboarding and developing new hires, and evaluates current bench strength to determine the types of personalities the company is missing—and should therefore target in future hires.

In light of this "life cycle" perspective, Haselman was able to build a sound business case for multiple uses of personality assessments. Shortly after she joined Benchmark Assisted Living four years ago, the company's current president asked her to review the PI. She was quickly sold on the tool's potential value—"The science behind cultural fit is extremely important and goes right to the bottom line," she enthuses—and assembled a three-pronged business case to present to the organization.

The first two parts of Haselman's business case, reducing turnover and developing high-potential employees, proved ripe for measurement. The benefits of the final component, conflict management, are more difficult to quantify, although Haselman tracks the tool's application in this area in a unique way.

Turnover is high in the senior-housing sector, routinely surpassing 80 percent. Benchmark's turnover rate was hovering at about 60 percent when Haselman joined the company and, shortly thereafter, began using PI Worldwide's assessment tool. This fall, the company's turnover rate dropped to 29 percent. She attributes the improvement to "hiring the right people," a process she says has been strengthened by using the PI.

### Analyzing Vendors

The ease with which personality assessments can be administered, and their results distributed, via the Internet has given rise to online assessments that may not be valid or reliable.

"Personality has a long, rich tradition in business assessment," says David Pfenninger, CEO of the Performance Assessment Network Inc. "It's safe, logical and time-honored. But there has been a proliferation of pseudo tests on the market: Caveat emptor."

Todd Harris, Ph.D., director of research for PI

In the three years since Benchmark Assisted Living has been using the PI to help develop a pool of about 100 high-potential employees, only two of those employees have left the company. Haselman and her staff use the assessment on these future leaders to set personal objectives and craft development plans that close the gap between their natural behaviors and motivations and the way in which their colleagues view them. Haselman believes closing that gap marks a crucial step in employee development.

Haselman also made the case that the tool would help bolster the organization's conflict management efforts. It has, she says, but the evidence is more anecdotal. If there is an issue between two employees, Haselman sits down with them and leads them through a comparison of their PI results.

"It stimulates a conversation," she says, "along the lines of, 'I'm a Mack truck, get out of my way, let me do it. You are a laid-back, methodical, structured, detail-oriented person. Of course we're driving each other nuts. How do we work better together based on our styles?'"

When the session concludes, Haselman places a record of the meeting and the participants' PI assessments into each of their personnel folders. The assessments have "become a part of our cultural language," says Haselman.

Her comments are echoed by LaCroix at Yankee Candle, who says personality assessments have helped "create a common, nonjudgmental language." For example, rather than complaining that a "supervisor is out to get me," an employee is more likely to note that their behavioral styles naturally conflict. Or, rather than saying that a direct report failed in a new role, an executive is more likely to investigate the mismatch from a personality-trait perspective and then reassign the direct report to a role that provides a better fit or to adjust the position's duties.

"The assessments have been really powerful because they take conflict away from being personal and make it about personality," says Haselman.

That seemingly contradictory quality, depersonalizing personality, is commonly expressed by fans of personality assessments in the workplace. LaCroix emphasizes that personality assessments are simply "an additional piece of information," but also says they are "part of the fabric of the company now."

Both points are true, and that paradox illuminates the most important trigger of a personality assessment tool's value: how the information is used. Human resource executives who apply that information correctly and broadly can help open the rest of the organization's eyes to better ways of harnessing its talent.

Worldwide and an adjunct psychology professor at the University of Massachusetts in Amherst, issues a similar buyer-beware warning to HR managers.

While emphasizing that the 1978 *Uniform Guidelines on Employee Selection Procedures*, published by the Equal Employment Opportunity Commission (EEOC), are the "gold standard" of workplace assessment development, he identifies eight questions buyers of personality assessment instruments should pose to vendors to get a firm grasp of the tool's validity and reliability:

1. What is the assessment designed to measure and accomplish, and how will that benefit the organization?
2. Does the assessment come with an accompanying job analysis tool that allows for the thorough identification of the job's requirements?
3. Is the assessment free of bias with respect to the respondent's age, gender or ethnic group?
4. Is the assessment reliable? That is, are people's scores on it relatively consistent over time (repeatable)?
5. Is the assessment valid? That is, does it effectively predict relevant workplace behaviors that drive metrics such as sales, employee longevity, customer satisfaction and others?
6. Is documentation supporting questions 3, 4 and 5 readily available in the form of a technical manual or equivalent documentation that is consistent with EEOC guidelines?
7. Is research on questions 3, 4 and 5 ongoing?
8. What are the key "implementation issues," such as cost, time it takes to complete the assessment, data security, scalability to all levels of the organization (note that many assessments can only be used at certain hierarchical levels or with certain jobs), ongoing support from the vendor, and degree of emphasis on client self-sufficiency/knowledge transfer?

—Eric Krell

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